GB Path to Growth

The Tourism Recovery Taskforce

Fáilte Ireland
National Tourism Development Authority

itic

northernireland tourist board

Tourism Ireland
Marketing the island of Ireland overseas

Members of The Tourism Recovery Task Force are:

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Fáilte Ireland
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Irish Hotels Federation
Irish Tourism Industry Confederation
Irish Tour Operators Association (ITOA)
National Trust
Northern Ireland Tourist Board
Tourism Ireland

GB Path to Growth

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Introduction

The tourism industry is vital to the economic, social and cultural health of the island of Ireland. Tourism creates employment and wealth, boosts exchequer returns and enriches our society. Unfortunately the island of Ireland has seen a drastic fall in the number of visitors from Great Britain (GB) in the past five years. It is crucial that we address and reverse this trend.

The Tourism Recovery Taskforce – which includes Fáilte Ireland, the Irish Tourism Industry Confederation, the Northern Ireland Tourist Board, Tourism Ireland and other industry representatives – has agreed and approved this unique report, which sets out a new plan for restoring growth from the island of Ireland's greatest source market.

Together, we have carried out a detailed review and developed a new strategy for attracting more British holidaymakers. We are targeting specific segments of the GB market by developing and packaging experiences designed to surprise, delight and enthral them, while remaining focused on consistently delivering value.

To make sure our message gets through, we are deploying a tailored communications plan focussed on reaching our best prospects and persuading them to book a holiday. Together, the tourism agencies will support the strategy in every way possible and are committed to ensuring that the plan is implemented speedily and in full.

Recovering the losses of the past five years will be a challenging and lengthy process. The GB Path to Growth report gives us a clear way forward and direction on how we can succeed in that goal. Regaining our market share in GB will take consistent and concerted action across the tourism industry. For this report to have the greatest impact possible, everyone active in the industry needs to align with the strategy and adopt the recommendations of this report.

Our new collaborative working model has proven productive and effective to date and I hope that it will continue as the new benchmark for developing the tourism business on the island of Ireland.

I would like to thank the working group, the Tourism Recovery Taskforce members, and all of the individuals and organisations who contributed to the development of this comprehensive strategy for recovery of the GB holiday market.

Vivienne Jupp
Chairperson, Tourism Recovery Taskforce

1 Executive Summary

The island of Ireland has seen an enormous decline in the number of British holidaymakers visiting over the past five years, causing a significant loss of market share from GB. As the total number of British holidaymakers is forecast to increase very slowly, the island of Ireland has to grow business faster than its competitors if it is to recover the level of visitor numbers it had in the past from GB. We are a niche player, but small increases in our market share would lead to hundreds of thousands more GB visitors. To be successful, we need an innovative approach to growing our tourism business.

We conducted extensive research with British holidaymakers and found they primarily view the island of Ireland as a short-break destination that competes mostly against domestic British destinations. We also found that the island of Ireland was rated poorly by GB holidaymakers on many of their key holiday motivation factors and our strengths, as we see them, do not always inspire holidaymakers.

The primary barrier to converting potential GB holidaymakers into visitors to the island of Ireland is that there are simply other places they would rather go, and these destinations are seen as better meeting their needs and interests. We need to catch up with, compete with and beat our competitors in the GB domestic market by making these holidaymakers aware the island of Ireland can and does offer the experiences they want.

We also need to overcome other barriers, including: the perception of GB holidaymakers that the island of Ireland is expensive; the lack of iconic experiences that would motivate them to travel to the island of Ireland; their lack of familiarity with Irish geography; and their belief that Ireland is 'olde worlde' and unchanging, so there is no urgency about visiting.

For Northern Ireland (NI), there are some additional barriers in that there is limited awareness of NI as a holiday destination and hazy knowledge of what is on offer. There is also the issue of recent history that raises concerns over safety and security.

Creating compelling destinations

This research also enabled us to identify what makes a compelling destination for GB holidaymakers. Among other factors, the best destinations focus on a well-defined group of potential visitors. Therefore, we devised a new consumer segmentation model for the British market. As we need to focus on immediate growth opportunities, we conducted further research to assess which of the seven identified segments were the best prospects for 2013 and 2014. The three most promising segments were: Social Energisers (young, fun-loving urban adventurers), the Culturally Curious (over 45s who want to broaden their minds) and Great Escapers (younger couples who want to get away from it all).

We adopted a new brand structure in which our tourism assets are grouped under an overarching master brand for the island of Ireland. Under this brand, we are grouping these assets by experience, rather than by geography or holiday type. Through extensive GB consumer research, we identified four experience types that are highly motivating for potential holidaymakers: Vibe of the City, Living Historical Stories, Awakening the Senses and Getting Active in Nature.

Focusing on experiences

Our product development strategy for the GB market will now have a much sharper focus on specific and compelling experiences that match the needs, interests and motivations of our three target segments. To this end, we will create and promote 'hero' or iconic experiences that can only be had on the island of Ireland. We will also develop a wide range of compelling supporting experiences, which will match the core motivations of our three target segments and be clustered together to make it easy for holidaymakers to access them.

As part of this experience development strategy, we recommend the tourism industry adopts the new market segmentation and reflects it through product bundling and communications programmes. A new trade channel strategy will enable the tourism trade to make the best use of the four key channels to market in GB: direct, online travel agencies, tour operators and tourism agencies.

We also want to address the perception in GB that the island of Ireland is expensive. The tourism agencies and the trade need to bundle specific experiences by target segment to show the value on offer, communicate the improved value to be had on the ground, address the cost of mid-range food and drink, and develop ways to measure and track value for money.

The current communications programme was not designed to target the new segments that have been identified and prioritised. Accordingly, a new communications strategy will be developed with specific propositions for each segment. Communications must be tailored to each target market segment and include specific information of interest to that segment. Our focus will be on getting 'new news' to GB holidaymakers and delivering a jolt to action, converting them from considering the island of Ireland as a destination to booking a trip. We will devise specific messages for each segment and communicate those to our target audiences through their preferred media.

We will also work on driving positive perceptions of NI through PR as well as differentiating NI within the communications.

Tracking and measuring success

This report demonstrates how the island of Ireland can regain market share in GB. To track and monitor the success of our new approach, we are putting in place key performance indicators and new measurement techniques. These will record visitor numbers, visitor spend and other key information, which will enable us to fine tune and evolve our approach through 2013 and beyond. We are confident that the implementation of all the elements of this strategy will restore growth from the GB holiday market to the Ireland of Ireland. Leading tourism experts, Oxford Economics, have estimated that growth could be close to 5% per annum during the period 2013-2016. This would represent cumulative growth of almost 20%, or close to 200,000 additional annual GB visitors, which would exceed the general outlook for travel in Britain.

2 The GB Tourism Market

2.1 Background

The island of Ireland has lost half of its tourism business from GB over the past five years. For meaningful recovery to happen, the island of Ireland must significantly outperform the general predictions for holiday travel from GB over the coming years. Exceeding the consensus forecasts is a big challenge and will require significant changes in the way we win business.

For British holidaymakers, the island of Ireland competes primarily against domestic GB destinations, which are seen as better value, with more must-see and must-do activities and experiences. The island of Ireland lost market share in GB despite the overall GB domestic holiday market growing by 11.7% since 2007. The GB short-stay holiday segment (one to three nights) is up 16.3% since 2007 and trips of four to seven nights are up 7.1%. The long-stay segment (more than seven nights) has contracted by 5.7% since 2007.

Ireland also competes to some extent against international destinations in the GB market. International holiday trips from GB are down 18.3% since 2006.

2.2 GB trips to the island of Ireland

The sharp decline in trips to the island of Ireland can be seen in the following table. Between 2006 and 2011, total trips from GB fell by 1.4 million or 27%. This figure includes holiday trips, business trips and trips to see family and friends. The spending associated with trips to the island of Ireland fell even more, down 33.4%.

Table 2.1: GB tourist trips to the island of Ireland 2006-2011

	2006	2007	2008	2009	2010	2011	Change 2006-'11
Trips (mn)	5.0	4.9	4.7	4.0	3.6	3.6	-27.0%
Holiday (mn)	*1.8*	*1.9*	*1.7*	*1.0*	*1.0*	*1.0*	*-42.0%*
Holiday trips to ROI	*1.7*	*1.8*	*1.6*	*1.0*	*0.9*	*0.8*	*-51.9%*
*Holiday trips to NI **	*0.1*	*0.1*	*0.1*	*0.1*	*0.2*	*0.2*	*n/a*
Nights (mn)	23.9	23.2	22.5	20.1	19.3	19.5	-18.4%
Spending (mn)	£1,462	£1,454	£1,417	£1,100	£963	£974	-33.4%
Avg. nights per trip	4.8	4.7	4.8	5.1	5.3	5.4	+12.3%
Avg. spend per trip	£294	£295	£305	£278	£267	£269	-8.6%

*Note: * When a revised NI passenger survey was introduced in 2010, the reported number of GB holidaymakers doubled compared with results from the previous survey methodology. This upswing is considered to be due to the methodological change. Therefore, more recent NI data on holiday trips from GB are not comparable with pre-2010 results.*

Source: Tourism Ireland. Exchange rate used for all-island revenue is €1 = £0.89. Some figures may not add due to rounding.

The post-2007 decline has been most dramatic in the holiday segment. Data for 2011 suggests visitors from GB are taking almost one million fewer holiday trips here than in 2007.

2.3 Competitive analysis

Economic forecasts indicate the GB economy will remain challenging, with anaemic growth over the medium term. Consumer spending will continue to be constrained as people pay off debts and focus on saving. To grow business in this market, the island of Ireland must win market share from its competitors.

We need to understand why consumers choose certain destinations, and assess the island of Ireland's strengths and weaknesses compared with competing destinations.

Feedback from GB holidaymakers shows they perceive the island of Ireland primarily as a short-break destination, with an average stay of five nights. Scotland, the Lake District, Wales and Devon/Cornwall were identified as the island of Ireland's primary competitors for short-break holidays.

Of those who have holidayed on the island of Ireland, 39% visited for city breaks, primarily in Belfast and Dublin. GB domestic cities plus Berlin, Copenhagen, Barcelona, Prague and Amsterdam were identified as the main competitors for Belfast and Dublin.

Our research found the island of Ireland, particularly the Republic of Ireland (ROI), is perceived as providing comparatively poor value for money. The island of Ireland also did not fare as well as GB destinations in terms of overall satisfaction ratings, according to GB holidaymaker research conducted in 2012.

British holidaymakers were asked how they would rate the island of Ireland on a list of 30 motivational statements, or holiday decision drivers.

Table 2.2: GB holidaymaker motivational statements or decision drivers

Minimum requirements or core motivators The most important decision drivers	**Differentiators** The second most important decision drivers	**Niche markets** The third most important decision drivers	**Specialist interests** The fourth most important decision drivers
Explore the place	Enjoy local specialities (food and drink)	Feel special or spoilt	Meet and have fun with other tourists
Enjoy the beauty of the landscape	Have dedicated time with my other half	Feel like you are part of the place	Challenge myself and push my boundaries
Spend time with my children	Chill/slow down to a different pace of life	Meet the locals	Experience adrenalin-filled adventures
Have fun and laughter	Experience things that are new to me	Be physically healthier	Party
Enjoy quality food and drink	Experience activities/ places with a 'wow' factor	Have a nostalgic experience	Learn a new skill
Soak up the atmosphere	Broaden my mind/ stimulate my thinking	Have lots of laid-on entertainment/ things to do	
Do what I want, when I want, spontaneously	Get off the beaten track	Better myself – gain new confidence	
Enjoy peace and quiet	Feel connected to nature	Visit places important to my family's history	
	Go somewhere different but familiar		

Holidaymakers rated the island of Ireland and competing GB destinations on these drivers. The island of Ireland was 'best in class' in just two of the minimum requirements and satisfied only one of the nine key differentiators. The island of Ireland was strongest for meeting locals, having fun with other tourists and partying. Unfortunately, these strengths are in niche or special-interest areas and do not motivate most holidaymakers. (See Appendix 1 for more details on this research.)

Those surveyed were also asked to rate city-break destinations, including Dublin and Belfast, against competing destinations such as GB domestic cities as well as Berlin, Copenhagen, Barcelona, Prague and Amsterdam. Dublin scored well on basics such as 'fun and laughter', 'spending time with my children', 'quality food and drink' and 'soaking up the atmosphere' as well as on key differentiators such as 'local specialties' and 'chilling out'. It scored particularly highly on niche and special-interest drivers, namely 'feel part of the place', 'meet the locals' and 'have fun with other tourists'. Belfast scored best on 'having fun with other tourists'.

2.4 What makes a compelling destination?

In addition to the holidaymaker research, we undertook desk research and study trips to further assess our competition. We concluded the best destinations deliver many different kinds of experiences for holidaymakers, but excel at one or two things. These 'hero' experiences are what make a destination stand out and become a 'must see, must do' place.

The best destinations also:

- focus on a well-defined holidaymaker market segment
- meet the needs of value-oriented holidaymakers
- make it easy for holidaymakers to access, interpret and engage with natural and heritage resources (transport, signage, information, interpretation, facilities etc)
- develop and communicate the meaning of their destination brand
- continually invest in marketing communications, including social media
- have a clear, common purpose that drives collaboration across key stakeholder groups
- continue to innovate and refresh their tourism experiences.

2.5 Key findings

The island of Ireland needs to focus on winning GB market share. If it is to perform strongly against competing destinations, it should:

- focus on specific parts of the holidaymaker market (target segments) that are receptive to the types of experience the island of Ireland can offer
- position the island of Ireland as a unique short-break holiday destination
- raise awareness of the experiences on offer on the island of Ireland
- develop, position and promote specific experiences to compete against comparative destinations
- develop and improve products on offer to create distinctive 'hero' experiences
- put in place a sustainable value proposition for holidaymakers as value for money remains a key reason people choose a holiday destination
- ensure all stakeholders work together, using much more focused communications messages.

The island of Ireland has the capacity to grow its share of GB visitors by developing distinctive experiences, optimising existing assets, aligning all key stakeholders and communicating in new ways with our target segments.

3 Our Brand

3.1 The brand architecture model

For the island of Ireland to capture greater market share in GB, its brand positioning needs to evolve and develop a much sharper focus on specific propositions for each market segment. We have adopted a consumer-focused brand architecture, which ensures we are all working towards a common, clearly defined goal.

The most effective way to present the island of Ireland as a tourism destination to potential visitors is to take an 'umbrella master-brand' approach. Under the umbrella of the overarching master brand for the island of Ireland, and led by consumer research findings, we are grouping our tourism assets around experiences, rather than by geography, holiday needs or holiday type. Research has found GB consumers are motivated by new experiences, but tend not to be familiar with Irish geography. Therefore, an experience-driven brand architecture makes the most sense.

Figure 3.1: The GB brand architecture for the island of Ireland

3.2 Experience types

We need to drive a reappraisal of the island of Ireland by potential holidaymakers. We want consumers to move from considering a visit to the island of Ireland to booking a holiday here. To do that, we need to highlight experiences that will serve as a jolt to action by consumers.

Consumer research suggests the most effective way to group all the brand assets under the single umbrella master brand is to group them into experience bundles. Packaging experiences is a great opportunity to inject excitement and 'new news' into the island of Ireland as a tourist destination.

Extensive GB consumer research has identified four different experience types that are highly motivating for GB consumers and which the island of Ireland can present to potential holidaymakers in a credible and engaging manner:

- **Vibe of the City** – fresh, exciting and stimulating experiences and attractions in a lively atmosphere
- **Living Historical Stories** – interesting and informative experiences and attractions in urban and rural areas
- **Awakening the Senses** – stimulating and profound experiences within natural and unspoiled landscapes
- **Getting Active in Nature** – revitalising and energising experiences and activities in the spectacular outdoors.

Presenting the island of Ireland as a destination that can deliver enriching experiences can disrupt perceptions of the island, highlight benefits not already known by potential holidaymakers and ensure it will be in the final consideration when holidays are being booked.

The research unambiguously shows the island of Ireland is not perceived as different enough from its primary competitors. We need to focus on those experiences that will appeal to potential visitors, force them to reappraise and serve as a jolt to action. These include 'hero' experiences that are iconic, appealing and easily recognisable to potential visitors as being on the island of Ireland, and key supporting experiences to encourage the perception that there is a range of things to see and do on the island of Ireland.

We know different types of experiences are powerful motivators for different market segments in GB. Therefore, we need to ensure that both communications and product development are more sharply informed by the combination of a motivating experience, or package of experiences, with the chosen market segment.

4

The British Holiday maker

4.1 Holiday motivations

Our research has shown tourists from GB do not see the island of Ireland as a destination that delivers strongly on the factors they consider most important for a holiday break. Our strong points, such as friendly people and good quality accommodation, are not motivating for this market.

To address the challenges facing the island of Ireland in the GB market and motivate prospective tourists, we have developed a new segmentation approach. The old model was a needs-based segmentation, which divided the market on the basis of what holidaymakers like to do on holidays. We are moving to a motivation-based segmentation based on the question: 'Why am I taking a holiday and how do I want it to make me feel, both during and after?' This approach delivers rich insights into potential visitors because it focuses on their motivations, which enables more effective targeting.

We conducted research with a robust sample of 10,000 GB residents who had taken holidays in GB and the island of Ireland at least once in the past three years. We asked them to rate destinations on the basis of 30 motivational statements, as outlined in chapter 2. On the back of this research, we divided the GB market into seven discrete groups or segments.

4.2 Segmentation

The seven segments are named to reflect the motivations of the potential visitors who comprise that segment.

Figure 4.1: The seven GB holidaymaker segments

Social Energisers

Young couples/adult groups looking for excitement, new experiences, and fun, social holidays in somewhere new and different

- 17% warm to ROI
- 10% warm to NI
- 48% under 34
- 38% single adult or adult only households
- 25% C1

Culturally Curious

Mostly older couples with time to spend. They are independent 'active sightseers' looking to explore new places and broaden their minds. They want to 'do a place', both its culture and the beauty of its landscape.

- 22% warm to ROI
- 9% warm to NI
- 68% over 45
- 54% couples or retires couples
- 48%

Great Escapers

Younger couples, some with babies or young children. They are interested in active & exciting exploration of countryside particularly and really experiencing an off the beaten track 'wow' factor.

- 15% warm ROI
- 9% warm NI
- 29% couples
- 44% B, C1

Top Tenners

This group tend to be younger with families. They do not have a holiday 'agenda' but are very active on holiday doing lots of stuff, they are looking to have a fun time with partner and occupy the children, if they feel better as a result, that's a bonus

- 16% warm to ROI
- 11% warm to NI
- 62% under 45
- 38% families

Easy-Going Socialisers

Couples, often older, (many 45+) pretty inactive, looking to slow down and relax, enjoy local food and company and perhaps explore their surroundings but not big sightseers

- 19% warm to ROI
- 11% warm to NI
- 73% over 45
- 30% retired households
- 44% C2, D, E

Nature Lovers

This is the oldest group (many 55+) they are looking for simple rural retreat where they can enjoy the beauty and peace and do a bit of sightseeing and gentle exploration

- 11% warm to ROI
- 5% warm to NI
- 83% over 45
- 34% retired households

Spoil Us

This group do little on holiday, they want to relax through chilling out, spoiling themselves a bit and enjoying sensory pleasures like food and drink and perhaps a little pampering

- 14% warm to ROI
- 6% warm to NI
- 40% 35-54's
- 41% couples and families with young babies

4.3 Barriers to conversion

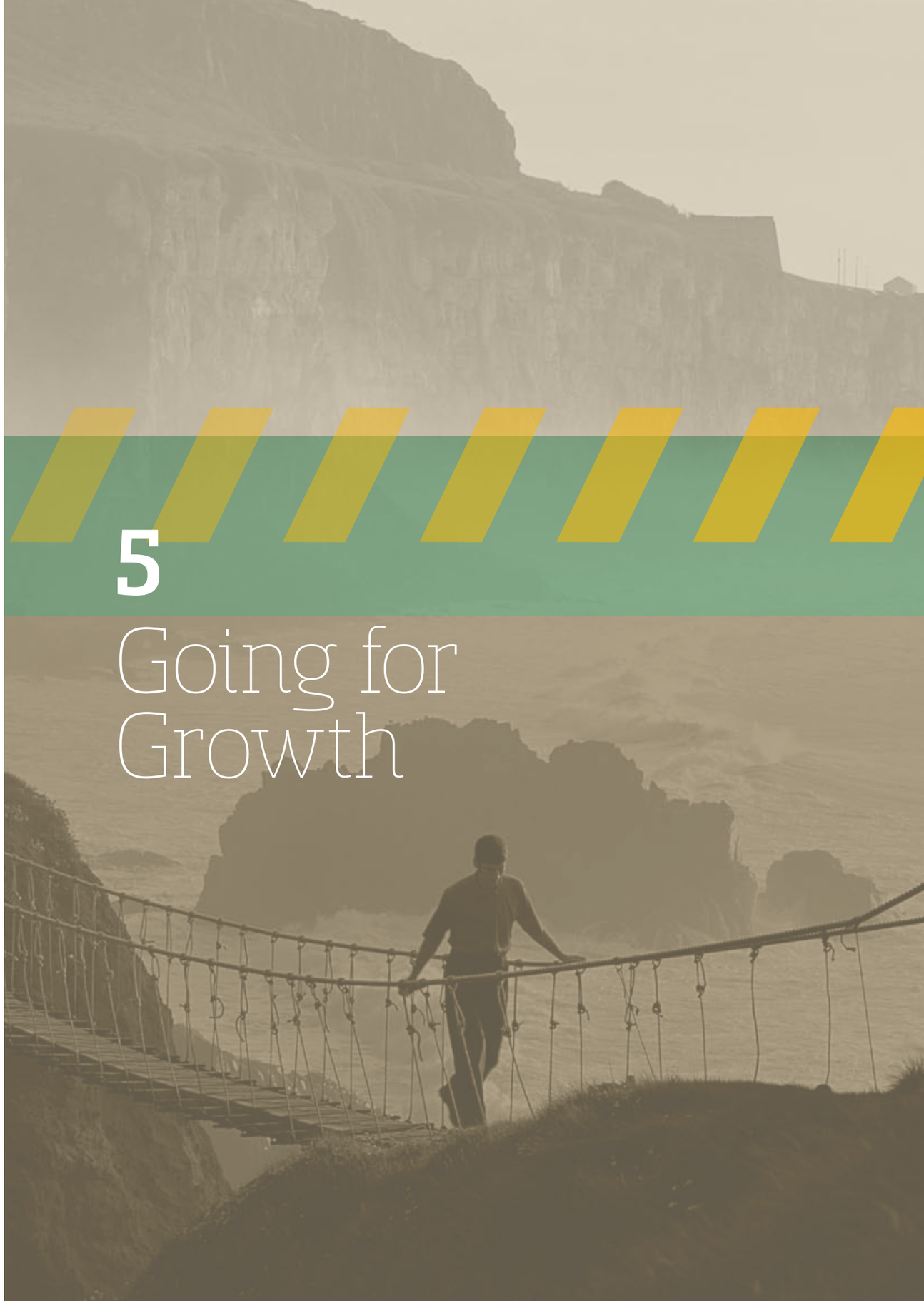
The research into GB holidaymaker motivations also revealed the key barriers to conversion, which hold true across all seven segments. These included:

- 'There is somewhere else I would rather go' – This was the lead barrier. The island of Ireland needs to improve awareness, perceptions and excitement around its tourism products and experiences
- 'Too close to home' – GB tourists believe they need a passport to get to the island of Ireland, so it is evaluated like other foreign destinations, but it is not seen as different enough from domestic locations
- Cost/value – While airfare deals and hotel deals may be strong, people evaluate the Republic of Ireland (ROI) on the perception and reality of cost on the ground. The cost of food and drink makes the ROI, in particular, seem expensive to GB holidaymakers, especially for a destination close to home
- Lack of iconic known experiences – Potential visitors imagine the island of Ireland offers a similar holiday to its closest competitors. They need to feel it offers experiences they could not have anywhere else
- 'What can I do and where is it all?' – The island of Ireland is compelling and credible because it offers a lot to do in a small geographical area. This advantage is lost because activities or experiences are not currently grouped into 'epicentres' or 'discovery centres'. Potential GB holidaymakers do not know what they can do in a few days
- 'I'll visit Ireland someday' – Potential visitors feel no urgency to visit as they have the impression that the island of Ireland is 'olde worlde' and unchanging.

The fundamental issue is that the island of Ireland is not seen as 'best at' the different motivating factors for GB holidaymakers. It is not top of the list when they go to book a holiday. Merely tackling the barriers, however, is not enough. The island of Ireland needs to focus on delivering 'new news' and a jolt to action.

To increase market share from GB, the island of Ireland needs to:

- target its best-prospect customers
- overcome the barriers that stop them booking holidays in the island of Ireland
- package experiences together that will surprise and delight potential holidaymakers, and match their motivations
- focus on promises that will convert those who have not visited before.



5 Going for Growth

5.1 Target segments

The island of Ireland needs to focus on immediate growth opportunities by identifying which of the segments listed in section 4.2 have the most potential for conversion in the near term. We will prioritise those, while keeping the other segments as a longer-term focus.

When choosing which segments to prioritise, we had to assess our ability to:

- bring the segment from 'I'll come someday' to 'I'll come now'
- motivate the segment's interest by being 'best at' for its main motivations
- address the current barriers to conversion by presenting the segment with a 'jolt' or fresh and positively surprising take on the island of Ireland
- capitalise on a segment's warmth towards the island of Ireland. If a segment is not 'warm' to the island of Ireland, it will be much more difficult (and expensive in media terms) to convince it to holiday in the island of Ireland.

When these factors were considered, Social Energisers and the Culturally Curious emerged as target segments for the immediate future. The Great Escapers have been identified as a segment for future focus.

Figure 5.1: The primary target segments for holidaymakers from GB

Social Energisers

Social Energisers are young and like to holiday in groups or as couples. A good example would be a group of 28 year olds on a long weekend in Dublin or Belfast. They're friends or colleagues looking for an exciting trip to a new and vibrant destination.

- 17% warm to (open to holidaying in) Republic of Ireland (ROI)
- 10% warm to Northern Ireland (NI)
- 48% under 34
- 38% single adult or adult-only households
- 25% C1

- 11% of total GB holiday market
- Island of Ireland share of this segment's holidays – 6.4%

Culturally Curious

The Culturally Curious are older and travel as couples or on their own. Typical Culturally Curious travellers would be 55 years old, taking a holiday with their partner. They are out to broaden their minds and expand their experience by exploring new landscapes, history and culture.

- 22% warm to ROI
- 9% warm to NI
- 68% over 45
- 54% couples or retired couples

- 11% of total GB holiday market
- Island of Ireland share of this segment's holidays – 3.9%

Great Escapers

Great Escapers tend to be younger and are specifically interested in rural holidays. Great Escapers are on holiday to take time out, get physical with nature and reconnect with their partner.

- 15% warm to ROI
- 9% warm to NI
- 29% couples
- 44% B, C1

- 13% of total GB holiday market
- Island of Ireland share of this segment's holidays – 2.6%

5.2 Why focus on these segments?

The Social Energisers were chosen because they offer the best immediate opportunity. The product they seek – vibrant city life – is already on offer in the island of Ireland. They are motivated by factors that the island of Ireland is strong on and comprise a younger market with fewer barriers to entry.

The Culturally Curious were selected as a target segment because they are high-value customers who respond well to good information, like exploration and will value both the product outside cities and the city product (without the nightlife). Of all the segments, they are also the 'warmest' to the island of Ireland and can be considered excellent prospects.

The Great Escapers are primarily looking for a relaxing, rural holiday where they can to connect with the landscape and soak up its beauty. The island of Ireland has the potential to deliver the holiday experiences they seek.

5.3 Experience propositions

The island of Ireland is a niche player and has a small share of each market segment in GB, but there is significant upside potential in a share-gain strategy. If we can achieve a percentage point increase in share across all of the three target segments (i.e. bringing Social Energisers from 6.4% to 7.4%), this would equate to 137,000 additional visitors.

We can grow our share by developing and communicating the experiences (see section 3.2) in the Republic of Ireland and in Northern Ireland (NI) that are relevant to each segment. This implies a move from product development to experience development, and a shift from capital investment to investment in cultural animation and entertainment.

Figure 5.2: Experience propositions by target segment and experience type

Target segment	Experience type	Proposition
Social Energisers	**Vibe of the City**	For people who are seeking fun and excitement, immerse yourself in Dublin, Belfast and our other great cities' energetic vibe for the whole weekend. You can really be at the heart of things, day and night. Get involved in the extraordinary day-time experiences and adventures inside the city and close by. And later, enjoy the unique atmosphere of our night-time experiences.
Culturally Curious	**Living Historical Stories** **Awakening the Senses**	For people who like to broaden their minds, immerse yourself in the fascinating discoveries you can make about Ireland's rich and diverse history and culture. Be exposed to our different way of seeing the world, and find out how we bring it all to life. These inspiring and interesting experiences are all within easy reach of each other..
Great Escapers	**Living Historical Stories** **Getting Active in Nature**	For explorers, escape your day-to-day routine and immerse yourself in Ireland's beautiful scenery and nature, to escape your day to day routines. Reconnect and bond with your loved ones and enjoy our outstanding natural phenomena and unrivalled historical sights, It couldn't be easier or more accessible than in Ireland.

We must talk to each target segment in the most motivating way and tailor the best experiences for them, while ensuring we do not alienate any other segments. Furthermore, we need to ensure the island of Ireland excels at providing 'hero' experiences, which are easy for holidaymakers to access, interpret and engage with. To achieve this, we have developed a clear proposition for each segment, based on the relevant type of experience. These were developed through product and experience development workshops, the outputs of which were tested with the target segments.

Social Energisers

This segment wants action-packed days as well as fun-filled nights. It wants to be able to access both within a short time and with the minimum of hassle. The island of Ireland needs to offer a combined focus on 'Extraordinary Days' and 'Happening Nights'.

We should consider 'City Plus' experiences, which combine opportunities for adventure in the city and close by. This segment does not see any other European city as offering this, but does not know that Dublin and Belfast can. Packaging experiences in this way would be 'new news' and would motivate these holidaymakers to book.

Key words: Excitement; energy; fun and laughter; adventure; spontaneous; social; the wow factor.

Focus: Entertainment; festivals; contemporary culture and music; clubbing; unique tours; comedy; water sports; the pub experience; shopping; sightseeing; the local scene.

Culturally Curious

These holidaymakers want to immerse themselves in the island of Ireland's culture and discover it for themselves. The island can give them a rich set of experiences that bring history and culture to life. They want to be able to 'do' a region of the island of Ireland easily. We can facilitate this by marketing 'discovery centres' or 'epicentres' of products and experiences, such as the Burren or the Giant's Causeway.

We will focus on creating a narrative that will cluster these nearby experiences into a small number of key propositions, such as the Wild Atlantic Way on the west coast, the Hibernian Heritage Trail (working title), and the Titanic, Causeway Coastal Route and the Walled City of Derry in NI. To appeal to this segment, we need to significantly improve the interpretation and animation of epicentres and heritage sites.

Key words: Curiosity; authenticity; insight; independence; immersion in culture; off the beaten track.

Focus: Broadening the mind; exploring new areas; active sightseeing; historical buildings and attractions; gardens; galleries; literary tours; World Heritage sites; visitor centres; local festivals and events; artisan food.

Great Escapers

Holidaymakers in this segment want to get away from the stress of a busy life and retreat to a relaxing rural environment. The experience offering needs to deliver very attractive and easily accessible experiences to this segment.

We have to emphasise the island of Ireland has experiences such as Connemara and Kylemore Abbey and the Fermanagh Lakes and Marble Arch Caves, which offer stunning immersive natural phenomena and architecture within a short distance. We also need to develop geographical hubs that cluster together a range of integrated outdoor activities. This segment can also be attracted by the establishment of national parks as centres of recreational activity, with trailheads offering amenities for various activities, along with maps, guides, food and drink, and secure parking. In the short term, we will focus on those in this segment who are not seeking family activities.

Key words: Slow travel; relaxation; rebalancing; taking stock; getting away from it all; connecting with family.

Focus: Breath-taking landscapes; ancient sites; remote places; landmarks; restaurants offering fresh, local food; authentic pubs.

6 Experience Development Strategy

6.1 The experience development challenge

We need to appeal to the key market segments (Social Energisers, Culturally Curious and Great Escapers) with relevant and targeted experience propositions. Within each of those propositions, we need to develop distinctive visitor experiences tailored to the interests and needs of the segments. By bundling experiences together, we can give holidaymakers from GB a fresh perspective on the island of Ireland and meet their value-for-money requirements.

Our research has found there are both awareness and delivery issues when it comes to our tourism product offering. The experience development strategy needs to:

- deliver different kinds of experiences for holidaymakers based on their core motivations or minimum requirements
- make sure destinations excel at one or two things – the 'hero' experiences required to make them stand out as 'must see, must do' destinations
- make it easy for holidaymakers to access, interpret and engage with 'hero' experiences
- drive collaboration with and across key stakeholder groups
- ensure we continually innovate and refresh tourism experiences.

6.2 Working with industry

While we implement the experience development strategy, it is crucial that the tourism trade fully adopts and integrates the new market segmentation and reflects it through experience bundling and communication programmes. Tourism businesses need to develop packages for each segment and specific experiences that will convert each segment to travel.

Value is key to this market (see chapter 9) and the tourism industry must develop and implement value initiatives, specifically around mid-range dining.

The industry also needs to maximise co-operative and partner activities to effectively communicate the most motivating experiences by segment to drive conversion. It is important that tourism businesses build stronger networks outside of the traditional tourism industry (in entertainment and heritage, for example) to develop and communicate highly appealing experiences for each segment.

6.3 Developing the product in Northern Ireland

Significant investment of more than £300 million has been made in Northern Ireland (NI) tourism products since 2007, resulting in five key signature projects. These projects are unique to NI and can help the area to gain global competitive standout and positioning. However, this investment alone is not enough to drive conversion in the GB market. NI will now focus on better enabling visitors to connect with the experiences that are most motivating to them.

The product and experience development strategy in NI will work at three levels. Firstly, we will work in partnership with the industry to create and develop a few distinctive and best-in-class 'hero' experiences. Secondly, we will develop supporting experiences that give breadth and depth to these signature experiences. Thirdly, NI needs to develop its reputation for consistently excellent customer service. As a key action at this level, we will roll out the World Host Training programme across the industry in partnership with People 1st (the Hospitality and Tourism Skills Council in NI) to ensure that, as a destination, we deliver an exceptional visitor experience.

6.4 Experience development plan

Our experience development strategy is designed to meet the needs and motivations of the target segments and to deliver experiences that work with the island of Ireland's brand architecture and the types of experience that motivate GB holidaymakers.

Social Energisers

This segment is a completely new target audience for which the island of Ireland has not previously tailored experiences and products. The challenge is to make Dublin and Belfast different from other European cities, with a programme of Vibe of the City experiences that will deliver excitement and adventure during the day, and fun and lively entertainment at night.

To meet the needs of this segment, we need to look outside the traditional tourism hotspots. Ideal experiences for Social Energisers could be found in inner-city hotspots off the main tourism trail in Dublin, such as South William St and George's St, for example. We can engage with a new set of relevant industry partners and trade in these areas, and help them develop more experiences targeting this segment.

Whilst Dublin and Belfast represent the greatest volume opportunity, other cities such as Derry/Londonderry, Cork and Galway also have potential for this group, particularly in offering easy access to activities outside the cities and particularly for those who may have already visited Dublin and Belfast.

City Plus

Create a distinctive urban experience that combines city life with exciting experiences along coastal and mountain areas. The coastal villages of Howth, Dún Laoghaire, Dalkey and the Dublin/Wicklow Mountains are all within 30 minutes of Dublin city centre and could provide a playground for daytime activities. Similarly, bouldering in the Mourne mountains or surfing off the North Antrim coast are available within 45 minutes of Belfast.

Festivals and events

Social Energisers love festivals, but could easily visit an Irish city without realising a festival is on. We need to:

- increase city centre visibility for existing festivals and major concerts
- develop a strategy to deliver more contemporary, quirky street festivals
- consider developing a major city centre outdoor event and animation space
- present a calendar of events and 'what's on' in relevant media channels
- continue to attract major international events that will help change perceptions of Belfast and NI

Contemporary music and culture

Promote cool, creative Dublin and a hip, edgy Belfast to this segment. Make Dublin distinctive by offering a platform for on-going/emerging Irish music. Differentiate Belfast through the promotion and development of contemporary music experiences available in intimate settings.

City 'animation' tours

Animate pedestrian areas of the city while interpreting its heritage. Sample tours could include a U2 tour on Dublin City bikes, a tour on Bram Stoker's Dracula , a Tribes Alive tour in Galway and a Brewery tour or a Game of Thrones film tour in Belfast.

Markets

Facilitate and support the expansion of regulated markets in and around the city – and not just food markets, but fashion markets, flea markets and so on.

City card

City cards/visitor passes will bundle offers and encourage this segment to experience more at a value-for-money cost.

Culturally Curious

Exploration and discovery are key to this segment. To appeal to the Culturally Curious, the island of Ireland needs to provide as wide as possible a range and variety of things to do and see. We should offer experiences that are out of the ordinary, not available to the mass market, brought to life in an engaging and informative way, and made accessible through local and personal guides. Enabling these holidaymakers to tailor-make their own experiences is important, as is developing epicentres in and around which experiences are clustered. These are likely to be rural or based in smaller towns and cities.

The Hibernian Heritage Trail (working title)

For the Culturally Curious, living historical stories are the most compelling experiences. Ireland's East Coast is one location that can evoke a unique sense of place, culture and people. Unlocking the potential of this route includes introducing new events, improved interpretation through guides and actors, and improved Dublin interpretation and presentation. We will also develop content for use both in developing the visitor experience on the ground and in communicating the story to the target segment.

The Wild Atlantic Way

The West Coast's Wild Atlantic Way, stretching from Donegal down to west Cork, is one of the world's most dramatic coastal landscapes. It provides an alternative offering for the Culturally Curious, who will enjoy a gentle exploration and discovery of the traditional culture that lies at its heart. The provision of discovery points along the Way will provide access to the best views, and present the stories of the people and the place in an engaging and memorable way.

A development plan is already under way for this route, which includes identifying and developing epicentres, loops, itineraries and complementary experiences. We also plan to improve interpretation, work with local trade, create food trails and nominate local food heroes, and establish new events.

Titanic & Maritime Belfast

Belfast is now home to the world's largest state-of-the-art Titanic visitor experience, which tells the Titanic story from its origin, construction, launch and demise, and includes a live undersea exploration centre. Development plans include the integration of Titanic Belfast with the wider heritage assets so that Belfast can offer the world's only truly authentic Titanic experience.

Giant's Causeway and the Causeway Coastal Route

Further integration and development is required of one of the World's Best Driving Routes, through the development of key sites and trails, and animation of the story through human guides, re-enactments, festivals and events.

Derry/Londonderry

Derry/Londonderry has been voted the first UK City of Culture in 2013. This presents a unique opportunity to connect with the GB market and for the city to be used as a gateway to wider NI. It is important the opportunity is fully maximised to enable the visitor to connect with the city's strong cultural heritage.

Great Escapers

We want to provide the Great Escapers with a chance to really get away from it all by immersing themselves in the best landscape and outdoor experiences the island of Ireland has to offer. For most in this segment, the island of Ireland is not currently on their radar and rates poorly on their key holiday decision drivers. While there is a range of experiences and products on offer to meet their needs, they are of variable quality and geographically dispersed. The experience development plan needs to put more structure on the experiences, open up available amenities and landscapes, and improve the overall experience quality.

To appeal to Great Escapers, we need to unlock the recreational potential of scenic rural areas through the development of integrated recreation trails, national parks, and coastal and marine areas. We will work to establish National Parks as centres of recreational activity with amenities relevant for various activities, as well as maps, guides, food and drink, and secure parking. While the focus in NI continues to be the realisation of its first National Park, there is potential to further develop our forests for social and recreational use.

We will develop integrated geographical hubs for a range of outdoor activities, develop adventure infrastructure and facilities, further develop the Mayo and Connemara greenways, promote the Wild Atlantic Way and build 'hero' experiences around the Causeway coast, the Mournes and Fermanagh.

7 Communications

7.1 A targeted strategy

The current communications programme was not designed to target the new segments that have been identified and prioritised. Accordingly, a new communications strategy will be developed with specific propositions for each segment. It will zone in on the passions of our target segments, and inspire them to take action and book a holiday on the island of Ireland. Our communications will focus on what is credible, motivating and differentiating for non-visitors. This will be a key filter for future creative work.

Non-visitors will hear confirmation of what they already know about Ireland, but they also need 'new news' that will serve as a jolt to action. We have to move potential holidaymakers from considering a trip to the island of Ireland to taking action and making a booking. We will implement a two-part communications model, where we inspire the target segments and also provide an urgent hook to maximise the number of immediate bookings.

7.2 Tailoring communications

The island of Ireland needs a tailored communications strategy with specific, sharper propositions for the three target segments – Social Energisers, the Culturally Curious and Great Escapers.

Our new creative approach will package experiences in a way that will jolt consumers and drive conversion across the segments. This more focused approach will be more efficient and enable us to target the hottest prospects with the most powerful and relevant messaging.

7.3 The segment marketing approach

The channel strategy will now focus on a more tailored approach by segment. The mix of communications for each audience will be based on their media consumption habits.

For both Social Energisers and the Culturally Curious, broadcast (TV, outdoor and cinema) can be important, although in a much more focused and narrowcast way than before. Digital and social channels will be key for Social Energisers, whilst press partnerships and sponsorship will play an important role for the Culturally Curious. For the Great Escapers, word of mouth, social media and online activity will be important. They may also be reached through some of the advertising aimed at the Culturally Curious. Use of PR and publicity will also be critical for this group. Across all media, we will work more closely with industry through partnership campaigns.

Advertising and sponsorship will be more targeted and more relevant for each segment, and should drive GB consumers to engage with the brand and take action. Our own content will also be tailored for each segment, with more relevant information and prompts to action based on that segment's passions (such as music, excitement and events for Social Energisers, and culture and history for the Culturally Curious).

To earn word-of-mouth exposure and interaction on social media, we will also have to connect with those passions and better understand social media sharing and how it matters to each segment. We will integrate this approach so that, for example, feedback from social media will be used to refine our broadcast messages. This will help deepen engagement and drive action.

7.4 Channel principles

The communications plan for each segment will focus on reaching consumers where they are most likely to be and engaging with them in ways that should drive conversion.

Social Energisers

We want to ensure this segment puts a trip to an Irish city on its 'must do' agenda for 2013 and this will drive our communications plan for this segment. Our activity will reflect the Social Energisers' shorter planning cycle and focus on short breaks. We will focus on engaging across multiple platforms and devices. We will target: specific TV channels, including video on demand (VOD); cinema; online media, such as news sites, apps and online radio; and social media. We will also allocate budget to digital and social activation to enable sharing and advocacy by this digitally savvy segment. We will adopt a more targeted, relevant broadcast approach to reflect their changing consumption habits.

Culturally Curious

We will continue to reveal the historical and natural beauty of the island of Ireland to this group, while also tapping into its fondness for history and food. To engage this audience, we will use a targeted campaign period to reflect their longer-term planning. We will generate and encourage content in trusted environments, such as press partnerships, which offer the information and have the authority to inspire this segment and gain its attention.

We will focus on maintaining engagement through television to reflect the traditional consumption patterns of the Culturally Curious. We will also target: news, travel and weather bulletins; endorsement from preferred radio stations; traditional outdoor advertising; VOD; and a select number of websites.

Great Escapers

While not investing directly in advertising for this segment, we will keep it in mind when targeting VOD, endorsement by preferred radio stations, lifestyle networks, and other online content and commuter format advertising. PR, publicity and social media will also play an important role for this group, engaging it through its interest in nature and history.

7.5 Marketing Northern Ireland in GB

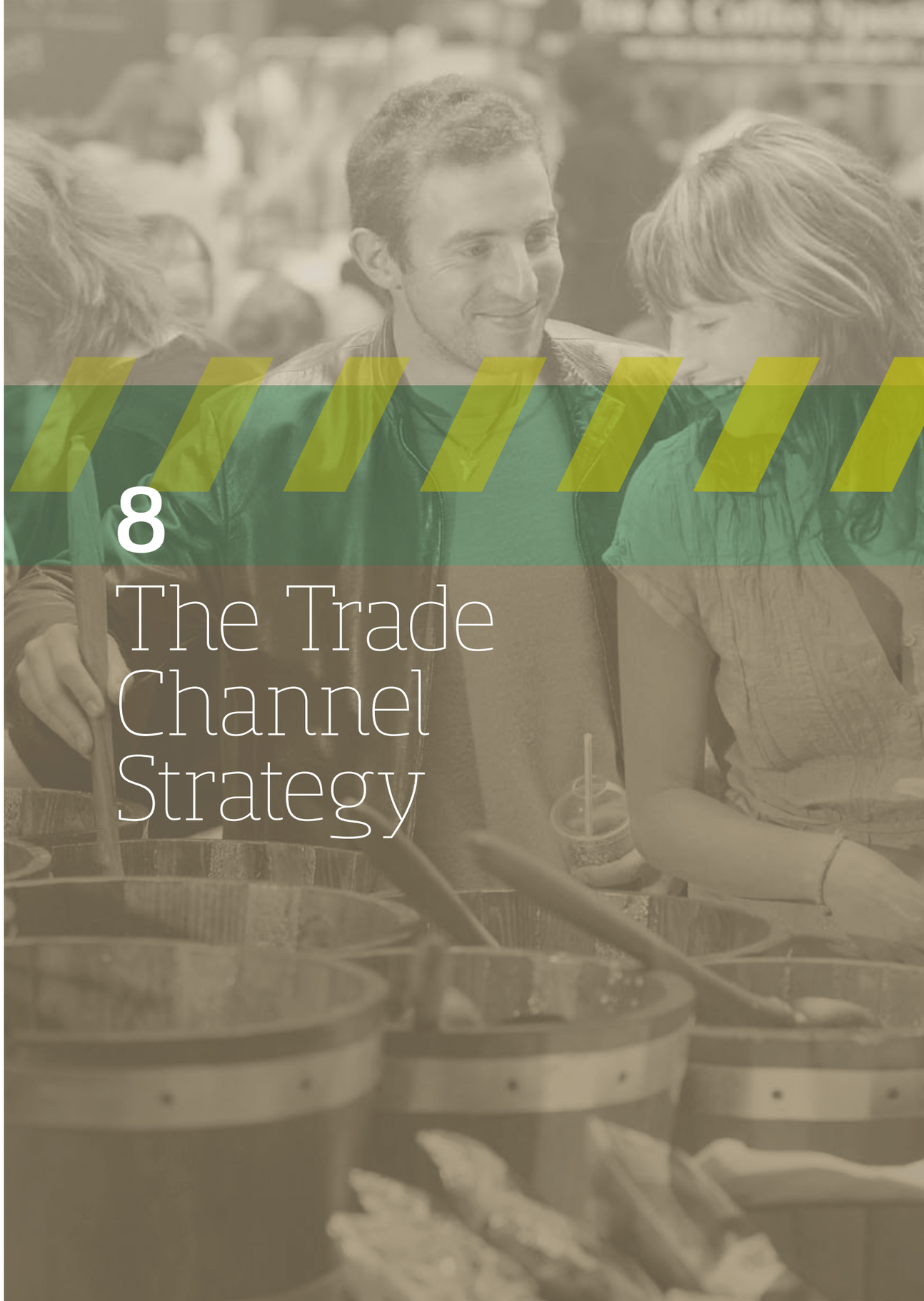
Although the strengths and weaknesses of Northern Ireland (NI) and the Republic of Ireland (ROI) are broadly similar, the key challenge in driving conversion for NI is different to that for the ROI. Firstly, there is limited awareness of NI tourism experiences in GB. Furthermore, and unfortunately for NI, the potential GB visitor sees it through a lens that can be harsh and unforgiving. The perception of NI for many was built up over years of seeing (and sometimes experiencing) constant negative imagery. Safety and security remains an issue, particularly for potential holidaymakers aged over 35.

Another difficulty for NI is that it has not stood out enough within the communications. Many potential GB holidaymakers attribute key iconic attractions such as the Giant's Causeway to the ROI, for example.

To overcome the additional challenges faced by NI, NI requires a dedicated communications plan that both differentiates NI within the communications approach and places an increased focus on PR that features more positive stories about NI. In this way, we can improve the picture of NI in the mind of the GB visitor, who builds up a composite picture of NI from various sources.

7.6 Evaluation and evolution

We will evaluate and test our communications messages on an on-going basis. As we are focusing on specific market segments, we can gather more real-time data, increase and enrich interaction with prospects and make the most of opportunities as they arise in different contexts. This will enable us to measure the effectiveness of the revised communications strategy in a dynamic and specific way. We can drill down further, assessing cost per action or cost per contact, rather than cost per visitor, for example.



8 The Trade Channel Strategy

8.1 Using the channels

Strong channels to market are critical to our success in GB. The four key trade channels to market for GB holidaymakers are: direct; online travel agencies (OTAs); the GB travel trade including tour operators, travel agents and group organisers; and tourism agencies. The industry needs to embrace them and proactively develop targeted sales initiatives across all of these routes to market. It is also critical that tourism trade businesses heavily promote the value on offer in the island of Ireland across all channels. Having a clear channel strategy will enable us to convert many more potential holidaymakers into actual visitors.

8.2 Direct

As the table below shows, British consumers are very likely to research and book travel online.

Table 8.1: Portion of GB holidays found and booked on the internet

Portion of GB holidays found on the internet

	Social Energisers	Culturally Curious	Great Escapers
All of their holidays	31%	34%	37%
75% of their holidays	32%	31%	38%
About half of their holidays	20%	19%	15%

Portion of GB holidays booked on the internet

	Social Energisers	Culturally Curious	Great Escapers
All of their holidays	35%	37%	36%
75% of their holidays	30%	27%	35%
About half of their holidays	18%	23%	17%

Source: GB Path to Growth consumer research, June 2012

To capture this business, individual tourism trade websites should be fully optimised to appeal to GB holidaymakers and speak to the segments with the best potential for their business. Individual tourism businesses should also:

- present a variety of clear price messages and value offerings
- develop experiences and products to appeal to target segments
- work to maintain a positive TripAdvisor rating and ensure all comments are addressed quickly – this is critical as TripAdvisor has huge reach in GB (13.3% of the population) and nearly six million unique users
- identify potential good-value advertising and promotional opportunities to present offerings to consumers at a key point in their decision-making process
- specifically get active in the social media space.

Good content is vital to the direct channel strategic approach. The tourism agencies and tourism trade need to ensure there is a consistent and motivating message for potential GB holidaymakers. Collectively, the island of Ireland's tourism industry should work together on a content strategy to analyse, create, publish and maintain useful, appropriate and current content that is developed to meet the needs and motivations of the GB segments. This content needs to be both owned and user-generated, and shareable throughout the industry.

8.3 Online travel agencies

As the GB consumer is internet-savvy, OTAs such as Booking.com, Expedia, Travelocity and Lastminute.com are an important channel to be considered. The top 10 OTA sites have an average conversion rate of 3.5%. More focus needs to be given to the business opportunities achieved by working with OTAs. The industry should plan strategically with the OTAs, for example, by ensuring rates are loaded far enough in advance and loading up their best value OTA offers during periods of increased focus on the island of Ireland, such as Tourism Ireland campaigns around St Patrick's Day and city-break campaigns.

8.4 Tour operators

Just under 10% of total GB holiday trips to the island of Ireland are still booked through the traditional tour operator and travel trade channel. There is also potential for additional business around special interests such as golf, walking and equestrian. We have re-evaluated the GB tour operators who do and do not programme Ireland and plan to engage further with non-traditional operators, including special-interest group organisers.

8.5 Tourism agencies

Fáilte Ireland, the Northern Ireland Tourist Board (NITB) and Tourism Ireland will refine their GB initiatives to specifically address the target segments and provide the trade with a channel to market. We will also:

- run free listings on tourism agency websites for the GB market
- run free listings of lead experience offers to appeal to target segments on tourism agency websites
- include experience offers in direct marketing ezines and mailings to holidaymakers within the target segments
- generate newsworthy stories to be used in publicity and social media
- participate at trade or consumer fairs, workshops and events, sales missions, and 'in-Ireland' events where GB buyers will be brought to meet the trade
- engage in partner collaborations that are creatively led by the partners.

8.6 Actions

The tourism agencies are eager to share the information gathered during this review and arm those in the industry with the tools they need to build an effective channel strategy for their business. Therefore, measures to be in place by the end of 2012 include:

- a GB-specific toolkit to provide insights into the marketplace and links for those who want to delve further
- content tailored for target segments, to be developed and shared across the industry and with partners
- increased engagement by Tourism Ireland with the GB travel trade and group organisers to focus the target segments on the island of Ireland
- more focused promotions and in-Ireland events aimed at the target segments and offered through tourism agency websites aimed at the trade
- an enhanced range of co-operative opportunities aimed directly at target segments made available on tourism websites
- the development of Fáilte Ireland's programme of sales capacity training and workshops, using the new insights, into the GB marketplace
- further development of the NITB training programme on selling at workshops.

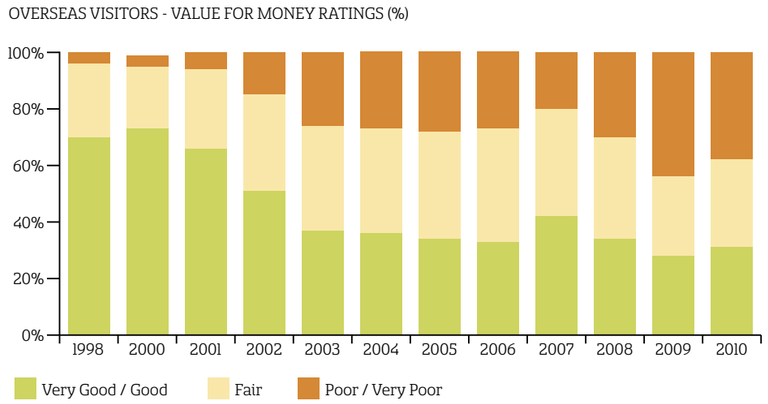
9 Value

9.1 Addressing value perceptions

The island of Ireland's tourism offering, particularly that of the Republic of Ireland (ROI), has suffered from an unfortunate and unwanted reputation in GB of being over-priced. GB holidaymakers are price-sensitive and have become used to deals at home. Value has increased in the domestic GB holiday market so expectations are higher. We need to promote the good value on offer on the island of Ireland, while remembering 'value' does not have to mean 'cheaper'. For the target segments, 'value' means 'worth it' and can be enhanced in various ways.

The bar chart below shows the trend in the value-for-money rating for the ROI over the past 10 years. The rating slid badly to 2009, when more than 40% of GB visitors rated the ROI as poor or very poor value for money. Fortunately, this trend is being reversed as more Irish businesses are offering better value and service improvements, VAT on various tourist goods and services has been lowered, and sterling has recovered against the euro.

Figure 9.1: ROI's value for money amongst British visitors 2002-2011



Source: Fáilte Ireland, Survey of Overseas Travellers.

While it is unrealistic to sell the island of Ireland purely on price competitiveness, we need to improve the perception of value and get the message across that there is better value to be had. The tourism agencies and the trade must:

- bundle specific experiences by segment to show the value on offer
- communicate the real improved value to GB holidaymakers and help them access the same good value deals that are available to locals
- address gaps, particularly in the mid-priced food area and the cost of family admission to events and attractions
- develop an improved mechanism for measuring value for money
- stay focussed on containing costs and enhancing levels of customer service.

9.2 Building and communicating value

Develop Value Experiences and Bundling

The tourism trade needs to support the segment-specific experience development work by developing good quality, innovative value experiences and bundled offerings. These offers should be easy to find and avail of, encourage booking and minimise customer service issues.

A Vibe of the City experience, for example, could be timed to link with a music or literary festival, offer accommodation linked to the music, books, plays or writers being celebrated, and include transport to and from the airport and a musical tour or literary walk with pick up at the accommodation.

The tourism agencies already have proven online systems to collect and distribute special offers through multiple channels. Changes will be made to accommodate and highlight experience packages and bundles and align with our new segments.

Messaging

In online and direct marketing, we need to make it clear the island of Ireland offers a quality, good value proposition (not a cheap proposition) and that we are worth it. This could involve different special offers and experience offers. Across other media channels and PR, we need to promote the same message. This could be done by arranging multiple value-oriented familiarisation trips targeted at GB publications. Co-operative activities such as joint advertising between the tourism agencies and the industry should also contain strong messaging relating to value and access.

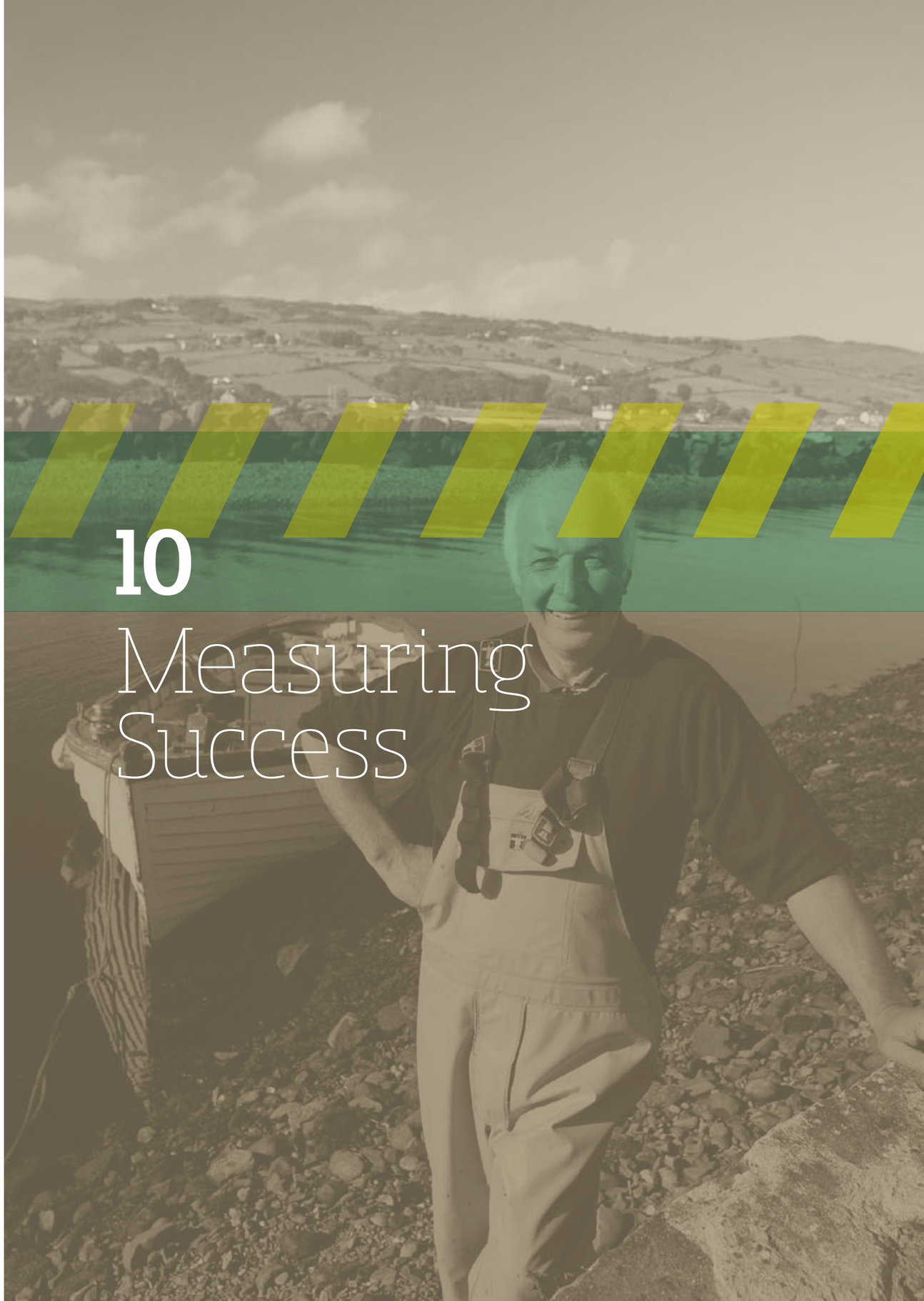
Better Food Value Experiences

GB holidaymakers are used to good value mid-day dining and many find mid-day eating in the ROI expensive. We need to develop programmes specifically for food services outlets, focusing on operational efficiency and productivity, so that outlets can provide visitors with a sustainable, better value mid-priced experience.

Price Tracker & Value Monitor

We will put in place an annual price tracker that will benchmark the prices of various tourism goods and services in locations in GB and the ROI. This will help us monitor the competitiveness of the island of Ireland's tourism offering against competing destinations in GB.

As the key issue is value rather than price, we will allocate more resources to better annual monitoring of how GB holidaymakers rate Irish destinations in value-for-money terms. Understanding the triggers of good value will help us develop an effective communications strategy in the GB market.



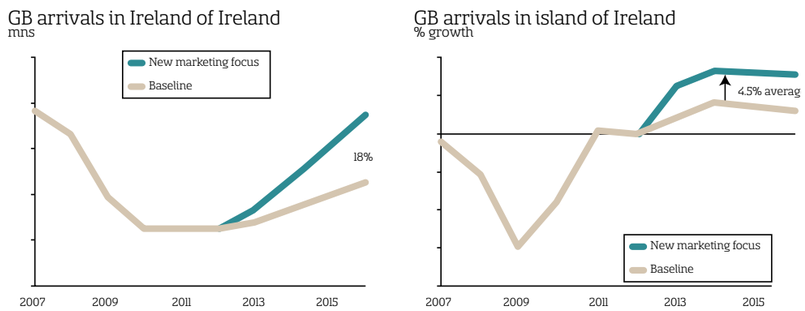
10 Measuring Success

10.1 Growth projections

By successfully focusing on the defined target segments in the GB market, we are confidently predicting a higher return on investment. Firstly, by targeting the faster-growing segments, we believe we will generate significant growth in GB visitor numbers. Secondly, by tapping into the new segments that now comprise a larger share of GB tourism demand, we will generate stronger growth. We are satisfied that this growth will be sustainable but caution that it will take a little time to achieve.

We are confident that the implementation of all the elements of this strategy will restore growth from the GB holiday market to the Ireland of Ireland. Leading tourism experts, Oxford Economics, have estimated that growth could be close to 5% per annum during the period 2013-2016. This would represent cumulative growth of almost 20%, or close to 200,000 additional annual GB visitors, which would exceed the general outlook for travel in Britain..

Figure 10.1: Illustrative GB arrivals in the island of Ireland 2013-16



Source: Oxford Economics

10.2 Key performance indicators (KPIs)

By having a specific set of key performance indicators (KPIs) and a measurement framework, we can focus our resources and drive towards achieving our targets. These are the KPIs by area of focus.

Market Share

- The percentage share of domestic holidays in GB by the three new segments, including share of city breaks
- Actual volume of trips by the three new segments

Revenue

- Actual spend by GB holidaymakers on the island of Ireland
- Holidaymaker bed nights on the island of Ireland

Communications

- Percentage of available GB holiday market who are planning a holiday on the island of Ireland

Channels

- Number and percentage of key trade partners adopting the segmentation model and experience types

Experience Development

- Percentage of GB holidaymakers who would "definitely" recommend a holiday on the island of Ireland

Value for Money

- Percentage of GB holidaymakers ranking the island of Ireland as "good" or "very good" value for money

10.3 Measurement

Measurement will be tailored around tracking overall performance and segment performance. Measuring results against targets will take place at a number of levels. In GB, Tourism Ireland will monitor the island of Ireland's segment performance through its Global Brand Tracker. In the Republic of Ireland, Fáilte Ireland will conduct an additional 1,000 exit interviews with departing GB holidaymakers. The Northern Ireland Tourist Board, with the Northern Ireland Statistics and Research Agency, will seek to do the same. Across the island of Ireland, we will gather real-time data from carriers and attractions to help monitor and measure tourist numbers.

10.4 Implementation

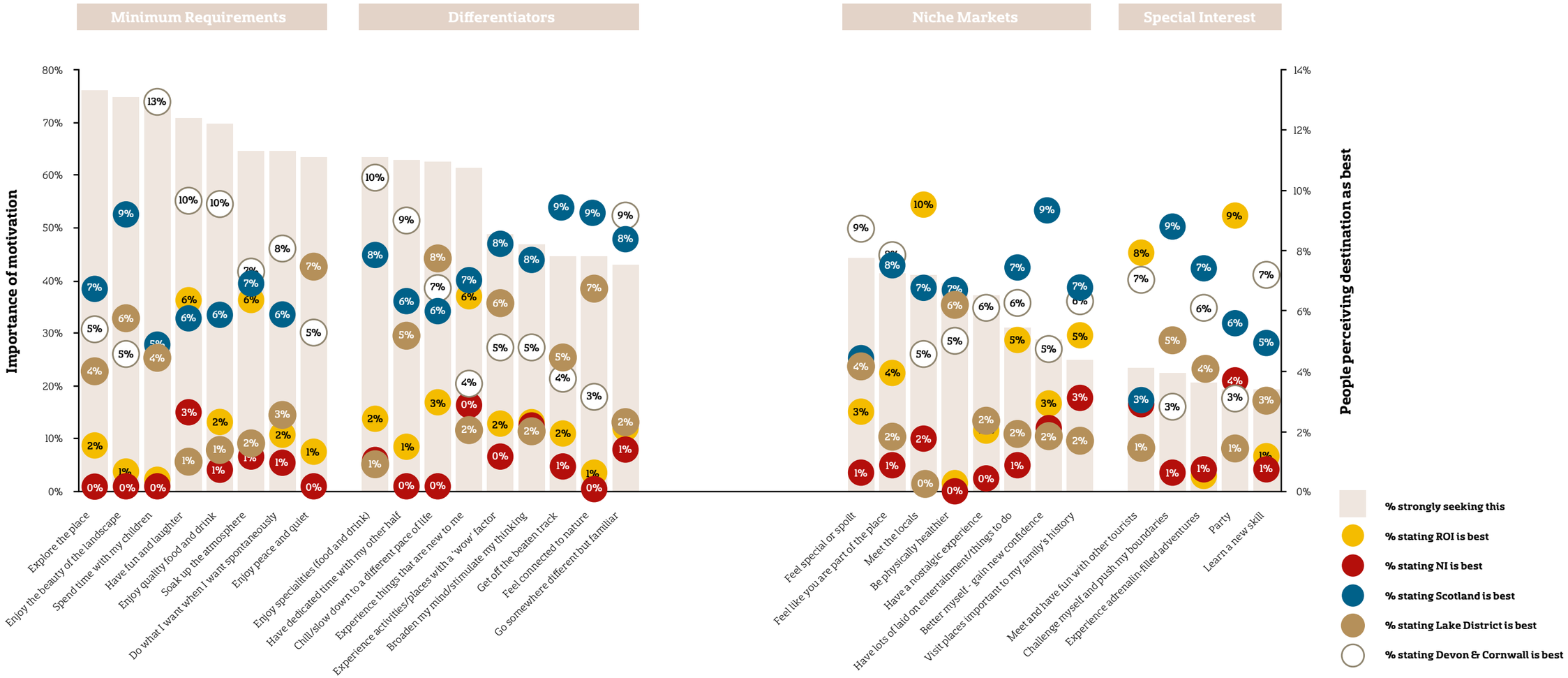
A clear strategy for the restoration of growth and rebuilding market share in GB has been developed on a joint basis between all the tourism agencies and the tourism industry. This unique collaboration has produced a credible roadmap that, if followed, will lead to sustained recovery in Ireland's largest market.

The experiences aimed at the target segments must be developed and communicated in partnership with the tourism industry and there will be on-going collaborative work between the agencies and the industry to realise the potential of the GB Path to Growth plan. Business owners will develop detailed operational plans which will be specific to the target segments.

The implementation of this plan will require continued collaboration and alignment of actions across the agencies and industry. The respective agencies and industry commit to work collaboratively to secure the great prize that can be won from the GB market. Regular progress reports will be provided to the Tourism Recovery Taskforce and to all stakeholders to ensure that all are informed of achievements.

Appendix I

Comparative analysis of destination strengths against decision drivers:



Interpreting this figure: For example, in the illustration above, starting with the left-hand axis, 'Spend time with my children' is a holiday choice driver for 70% of GB holidaymakers. Reading from the right-hand axis, Devon and Cornwall is considered to be best at 'Spend time with my children'. In this case, the white bubble shows it as the top-rated destination, with 13% of GB holidaymakers stating that it was best at this holiday choice driver.

Appendix II: Acknowledgements

Tourism Recovery Task Force member

Vivienne Jupp	Chair
Alan Clarke	Northern Ireland Tourist Board
John Doran	Belfast International Airport
Scott Field	Google
Paul Gallagher	Irish Hotels Federation (IHF)
Niall Gibbons	Tourism Ireland
David Kelly	Aer Lingus
Tony Kelly	Irish Ferries
Brian McColgan	Abbey Tours/ITOA
John McGrillen	Belfast City Council
Eamonn McKeon	Irish Tourist Industry Confederation (ITIC)
Brona Moffett	National Trust
Shaun Quinn	Fáilte Ireland

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Laura McCorry	Northern Ireland Tourist Board
Eamonn McKeon	Irish Tourist Industry Confederation (ITIC)
Peter Nash	Tourism Ireland
Anne-Marie Taylor	AMT Associates
Caeman Wall	Fáilte Ireland

Other organisations

Restaurant Association of Ireland
Irish Tour Operators Association (ITOA)
The Irish Hotels Federation
Genesis
MCCP
Arkenford
Carat
Publicis

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