

Tourism

TRENDS & INSIGHTS



Fáilte Ireland

National Tourism Development Authority



Surprise Me!

Fáilte Ireland Trends & Insights

Surprise me!: What is it about?



With so many ways to preview and pre-check experiences disappointment is ever harder to swallow for traveller today, who is more willing to pre-plan their holiday adventures than to go it alone.

But we recognise too the prevailing social norm that adventure is cool, fun, desirable. That consumers still want surprise and adventure without risk presents great opportunity for brands able to negotiate this conflict.

Brands that can help consumers to pre-verify that their experience and holiday choices and engineer great surprises for them will best resonate with the 'surprise me' holiday culture.

Surprise Me!

Amidst all of the pre-programmed, neatly arranged and predictable travelling plans, consumers around the globe will still crave one of the essential ingredients of every exciting trip - a sense of serendipity. However, speaking to the no-risk-at-all-costs mindset, travel brands will have to present consumers with a sense of managed discovery, which allows for adventure - but without the danger of disappointment.

Signals

% interested in a service that suggested one new place to visit, that visitor would not normally consider

Global
Average
50%

GB
55%

USA
54%

France
59%

Impact

- ▶ The delight of a new discovery cannot be underestimated. What is unique and surprising about Ireland's tourism experiences – the story, the customer service, the sense of fun?
- ▶ Understanding people's contextual needs will be essential to engineering good surprise options.
- ▶ Location based recommendations are one opportunity for in the moment surprise.

What's Driving this Trend?

Consumer Behaviour is complex and as a result trends rarely occur in isolation. This trend is influenced but the following other trends

MOBILE LIVING

Smart devices connect us with reviews and information anytime anywhere.

By 2017 more than 3 billion people will have wireless access to the internet

DEATH OF RISK

The information age has left global consumers more sensitive to risks & disappointment

People should think about safety before fun / adventure
70% in US agree

BEST FACE FORWARD

The importance of social recognition fuels fear of missing out

1.5 billion photos uploaded and shared daily

Surprise Me

Trend in Action

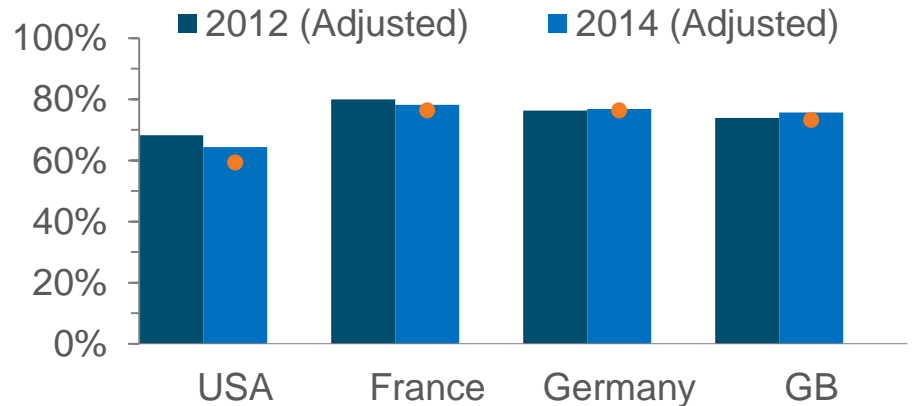


- ▲ **#CallBrussels:** Brussels' locals answer questions from worried travellers, after a terrorist plot -about life in the city
- ▲ <https://call.brussels/>

► **Foresee** is an app that its developers say can help people to plan their activities based on the current weather, time of day and their personal preferences.



When I plan a trip abroad, I find out as much as I can about the destination before I go : % agree



- ▼ “I would never go to a restaurant before reading reviews about it online” GB

Gen Y : 23%
Gen X : 15%
Baby Boomers : 9%

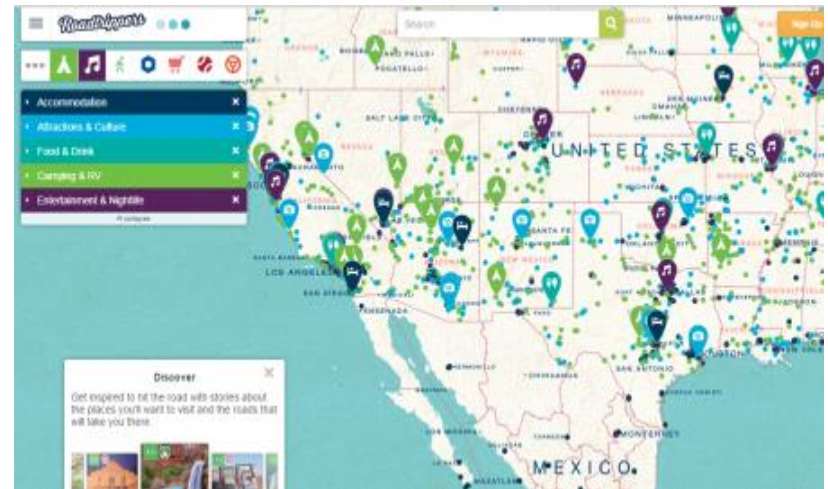
Source: nVision Research | Base: 5008 online respondents aged 16+, GB, 2015 February
Source: nVision Research | Base: 1000 online respondents aged 16+, GB, 2015 September

Trend in Action



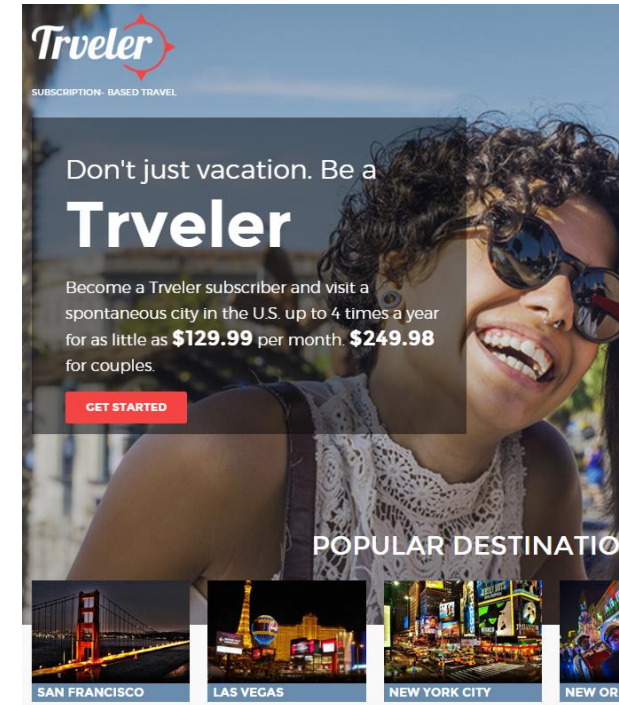
◀ **Traffle** is a travel app which provides its users with a “shuffle-able” travel itinerary. The app connects users with like-minded peers through their social networks, aiming to inspire otherwise unlikely experiences.

▶ **Roadtrippers** is a mobile and online platform that allows users to plan a trip using the most interesting rather than most efficient route. The platform hosts a wide collection of recommendations from local experts and travel writers who have curated over 100,000 places of interest across the United States. Roadtrippers allows users to “pick and mix” from these locations based on their personal holiday expectations, whether that is a cultural trip or a food tour.



Trend in Action

► **Trveler** is a subscriptions service for travel : spontaneous and options choices - spontaneous the city break is a surprise, options the cities are pre chose but the allocation is a surprise. People can choose their travel dates three months in advance, and get notified 2 weeks before departure on destination and hotel.



Trveler
SUBSCRIPTION-BASED TRAVEL

Don't just vacation. Be a
Trveler

Become a Trveler subscriber and visit a spontaneous city in the U.S. up to 4 times a year for as little as **\$129.99** per month. **\$249.98** for couples.

[GET STARTED](#)

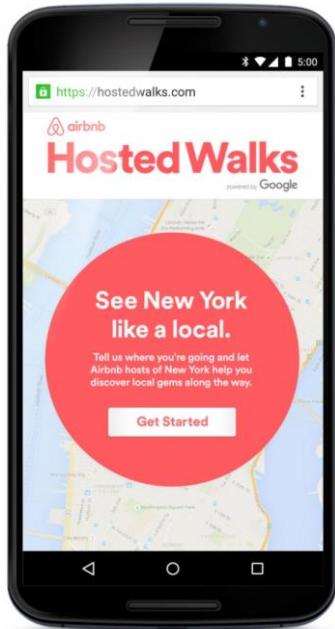
POPULAR DESTINATIONS

- SAN FRANCISCO
- LAS VEGAS
- NEW YORK CITY
- NEW OR



◀ In March 2015, **MasterCard** announced the introduction of a designated app to support its **Priceless Surprises** campaign, allowing participating brands to geo-target users with relevant deals and commercial messages

Trend in Action



◀ Airbnb hosted walks: this Airbnb campaign sent an option to take a hosted walk to people who searched directions when in the vicinity of Times Square. The link gave them a route to their destination that highlighted hidden gems - as recommended by local Airbnb users - along the way. When they reached a spot of interest they could listen to an audio description from the Airbnb host. This was for a campaign so not released for other locations....

▶ In July 2015, **Sheraton Hotels & Resorts** launched a special menu which offers unusual combinations of food and drinks to surprise guests' palates.

Examples on the menu include a Banana Bread Peanut Butter Sandwich paired with Tawny Port; La Quercia Smoked Prosciutto with Scottish ale; and Cantonese Style Salt & Pepper Chicken Wings, paired with Riesling or IPA. The culinary experience is available at all Sheraton hotels worldwide.



Trend in Action



◀The Canadian airline, **WestJet**, for the last four years has surprised its customers at Christmas time. From tailored surprise gifts to turning a departure lounge into the North Pole, it is constantly looking for ways to excite travellers, and turn the long waiting times into a source of fun. Each year the videos posted online have thousands of views.

The **Hyatt Palm Springs** learned how to wow guests on wheels. Each evening for happy hour, a staff member will knock on each guests' door and offer them complimentary items from the "Wow Cart" (aptly named for the reaction that guests have). One Hyatt Diamond Member described his reaction after encountering the free Wow Cart items, *"I can't remember the last time something like this made an impression on me. It's simple, but it sets the hotel apart and makes you remember it."*



CONSUMER JOURNEY



STAGE OF CONSUMER JOURNEY	BOOKING	INSPIRATION FOR ACTIVITY ON HOLIDAY
<p>SOCIAL ENERGISERS Want happening days and extraordinary nights</p>	<p>Won't risk being bored and are most likely of the segments to pre book excursions and attractions to ensure they have enough to see and do. They also like to see images of all there is to offer and what they can expect, as reassurance that their need for a busy and exciting holiday will be fulfilled.</p>	<p>More concerned than other segments with inspirational information on things to do. They trust supplier website sites and other consumers for recommendations.</p>
	<p>In order to take advantage of this trend Social Energisers require information and images before they travel that hints at the surprise that awaits them. Exceed their expectations with contemporary novel ways to share new stories. Highly satisfied visitors will reward you with positive word of mouth and online reviews. This group are also up to being spontaneous and ready to try new things and so location based recommendations are another opportunity for in –the-moment surprise. These can be offered either offline by cross promotion opportunities with other local operators and accommodation providers or online by utilising location-based advertising to promote your experience to visitors within a close proximity to your business.</p>	

STAGE OF CONSUMER JOURNEY

BOOKING

INSPIRATION FOR ACTIVITY ON HOLIDAY

CULTURALLY CURIOUS

Want to get under the skin of a destination and travel like a local

Gather lots of information before the trip and enjoy the process of doing so, but are more likely to book in-destination and with the provider. They don't like to follow the herd and like to keep their options open.

Enjoy discovering places when they arrive, and are more likely to use the tourist board website for information.

For the Culturally Curious who will research things to do but don't necessarily book until they are on holiday, recommendations from people they interact with (locals, trade and other visitors) is key.

Surprise this group with authentic stories unique to the area not found in the guide books. Incorporate the sights, smells, tastes and sounds of the place, even better if you can connect a local story to their country of origin.

Make this Trend Work for You

- ▣ Strong images online of what's different and novel about your experience or accommodation is key
- ▣ Testimonials/reviews from visitors about how your experience is “must see”, “surprising” and “beyond expectations”
- ▣ Provide a sense of fun and intrigue in the context of what a visitor will expect
- ▣ Is everyone in your area talking to visitors about your experience? If not, why not?
- ▣ Surprise visitors by sharing local events and “what's on today/ tonight”
- ▣ Are we taking advantage of our storytelling culture to best effect to deliver surprising experiences?

Examples of Trend Working

Guests were asked to sing when they arrived to check-in at **Joie de Vivre hotels**. Visitors who did, received an upgrade, and videos were posted online, to increase consumer engagement. Fans could vote on their favourite, who won a free two night stay!



Guests at **Ritz-Carlton** were asked questions like how they like their coffee on Facebook. For respondents who booked a stay, staff surprised guests with detailed knowledge of the preferences.

What's next? Impulsive Leisure

Attending? Yes, No, Maybe. New fluidity in leisure planning, where cancelling, rearranging and trumping on the fly are the new normal. As consumers aspire to make most out of every minute of their leisure time, making the best choice in a world which offers a seemingly never-ending stream of options that could be a bit *more* exciting than the last becomes a challenge and encourages impulsive last-minute decisions.

Last-minute planning has always been part of travelling, however what is new about this trend is the relationship between last-minute impulsiveness and the need to stay in control.

Signals

"I often make leisure plans at the last minute"

USA	GB	France
40%		37%

Impact

- ▶ Travel services that enable consumer-led spontaneity while reducing risk will appeal to the impulsive traveller
- ▶ Can Ireland offer quick / no plan holiday options for European neighbours looking for a quick getaway? Is this holiday need for controlled impulsivity being met?
- ▶ For those travelling from further afield not yet considering Ireland as part of a Europe tour, how can Ireland be easily added on at last minute?

Impulsive Leisure in Action



◀ **LuckyTrip** is a travel app which generates surprising travel recommendations that take out the need for planning completely. Users are asked to pre-set a budget before tapping the Lucky button, which then generates a potential trip, broken down into more specific suggestions.

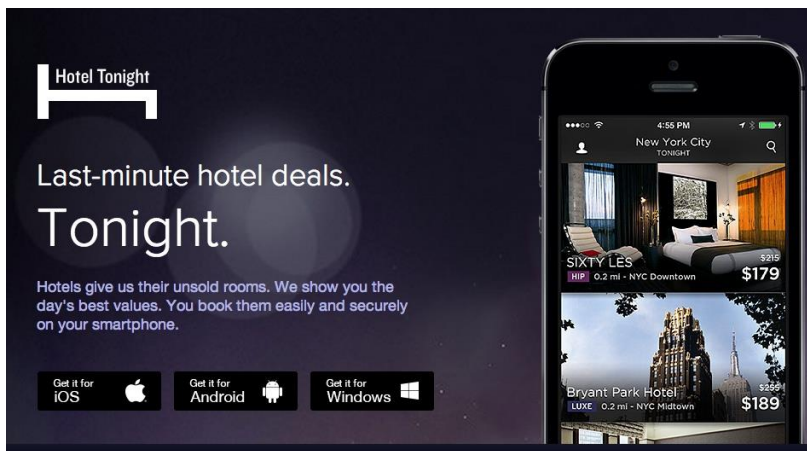
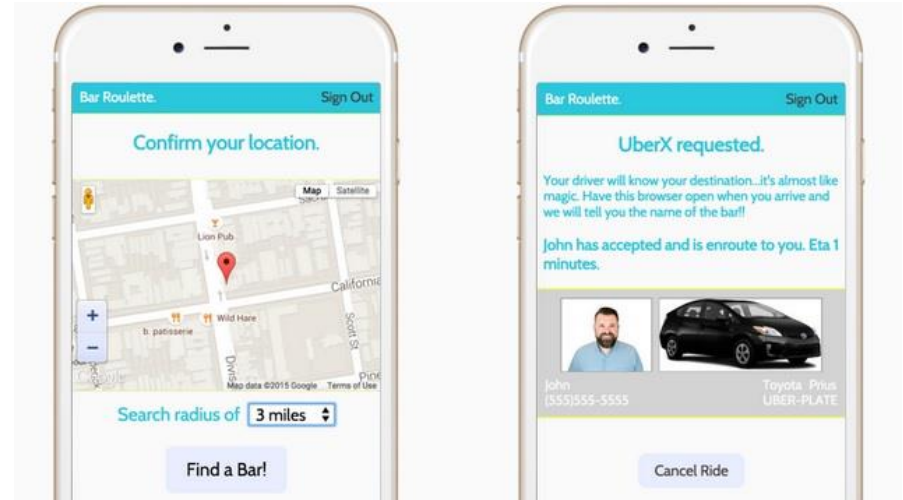
◀ In April 2015, train operator **Thalys** launched its **TickUp** service. The company invites consumers to plan a trip between Paris and Brussels no more than a week in advance. If they manage to form a group of 4 within the next 48 hours, each traveller gets to enjoy a fixed price of €29 per person for a one-way ticket.



Impulsive Leisure in Action

► **Bar Roulette** is an app which selects a random bar based on a user's location and immediately orders a taxi to take them there, only revealing the chosen destination upon arrival.

The app relies on reviews from **Yelp** to choose popular user-rated bars within a radius determined by the user. It requires users to sign in with **Uber** and sends an **UberX** to take them to the chosen bar, disclosing full details only as the user approaches the surprise location.



◀ **Hotel Tonight** lets you book hotels at the very last minute, for when you decide at the last minute to stay an extra night, or turn the night out into a longer weekend stay!