

GOING FOR GROWTH IN A MATURE MARKET: a game changing strategy for Irish tourism in Britain

Third Annual Tourism Policy Workshop
Dromoland, November 2012



Tourism Recovery Taskforce:

Aer Lingus 


IRISH FERRIES


abbeytours
experts on ireland

IRISH
HOTELS
FEDERATION

itjc

Google

Belfast 
International Airport


National
Trust



 **Fáilte Ireland**
National Tourism Development Authority

 **Tourism Ireland**

 **northernireland
tourist board**





Overview

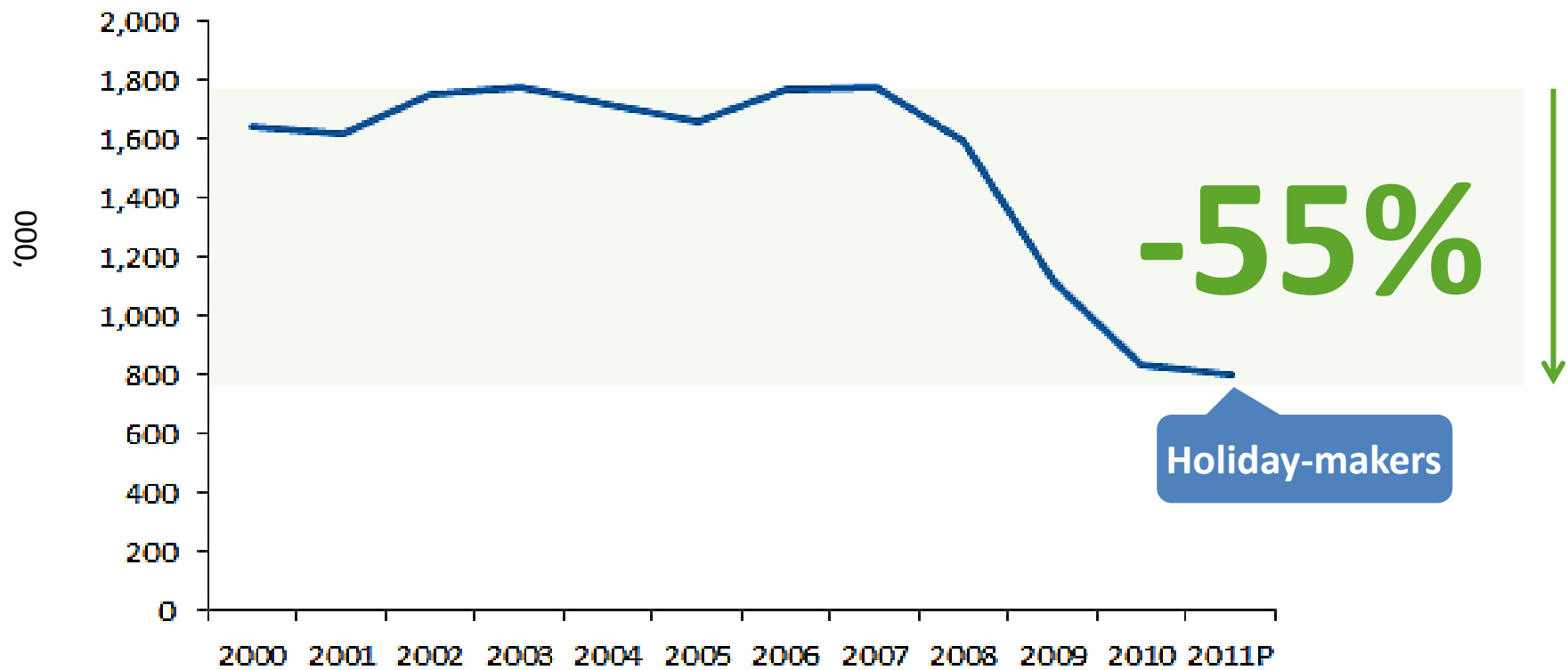
- › **The GB market**
- › **Our analysis**
- › **The game-changing strategy**
- › **Measuring success**



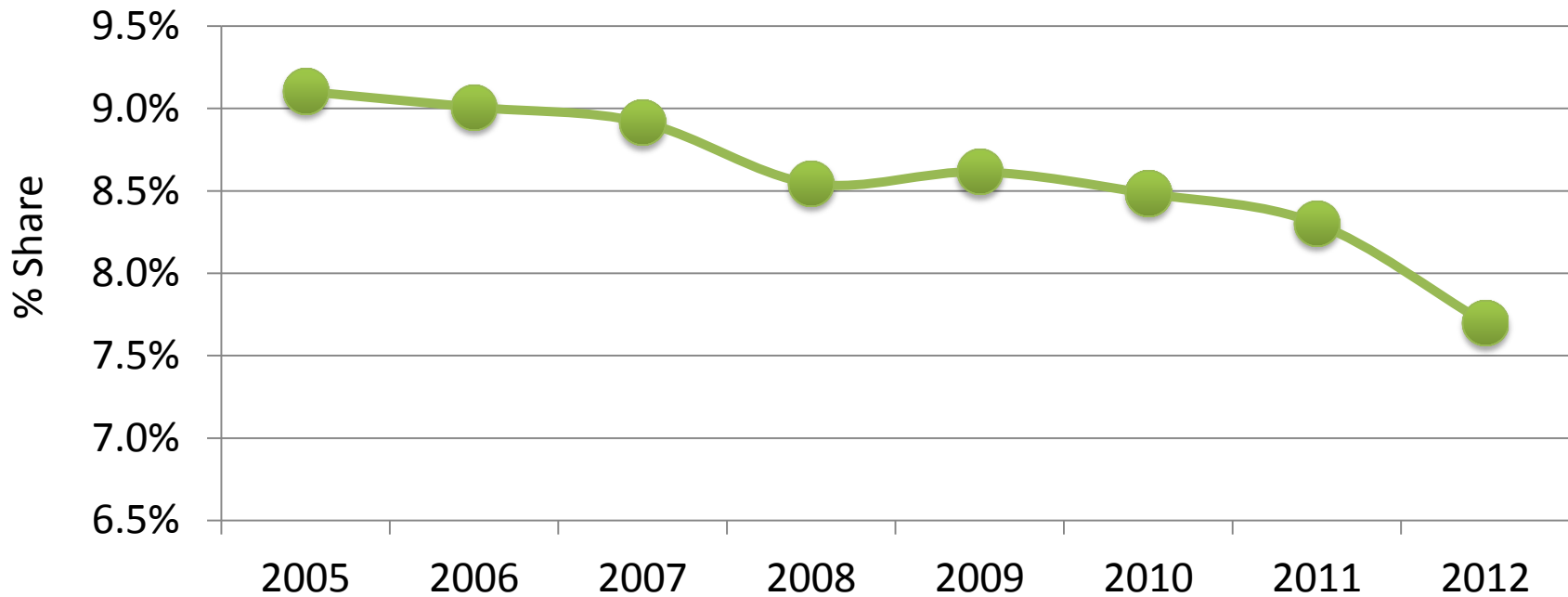
The GB market – context and performance!

- › Our analysis
- › The game-changing strategy
- › Measuring success

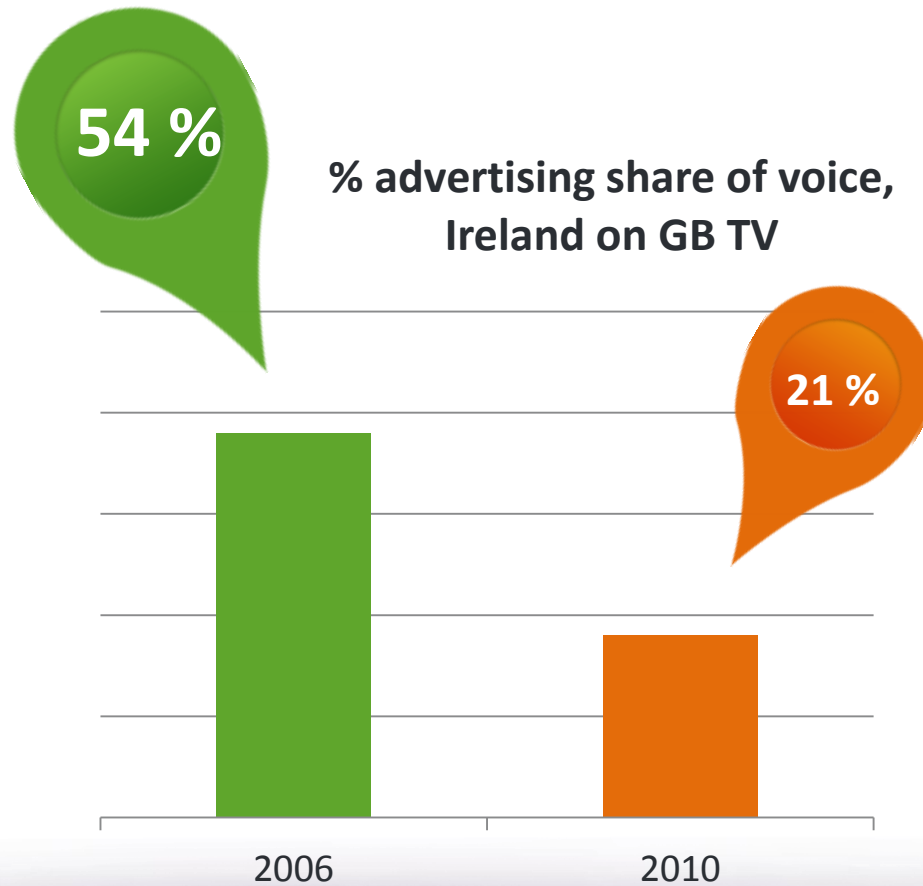
Holiday-makers from GB have declined by 55% in five years



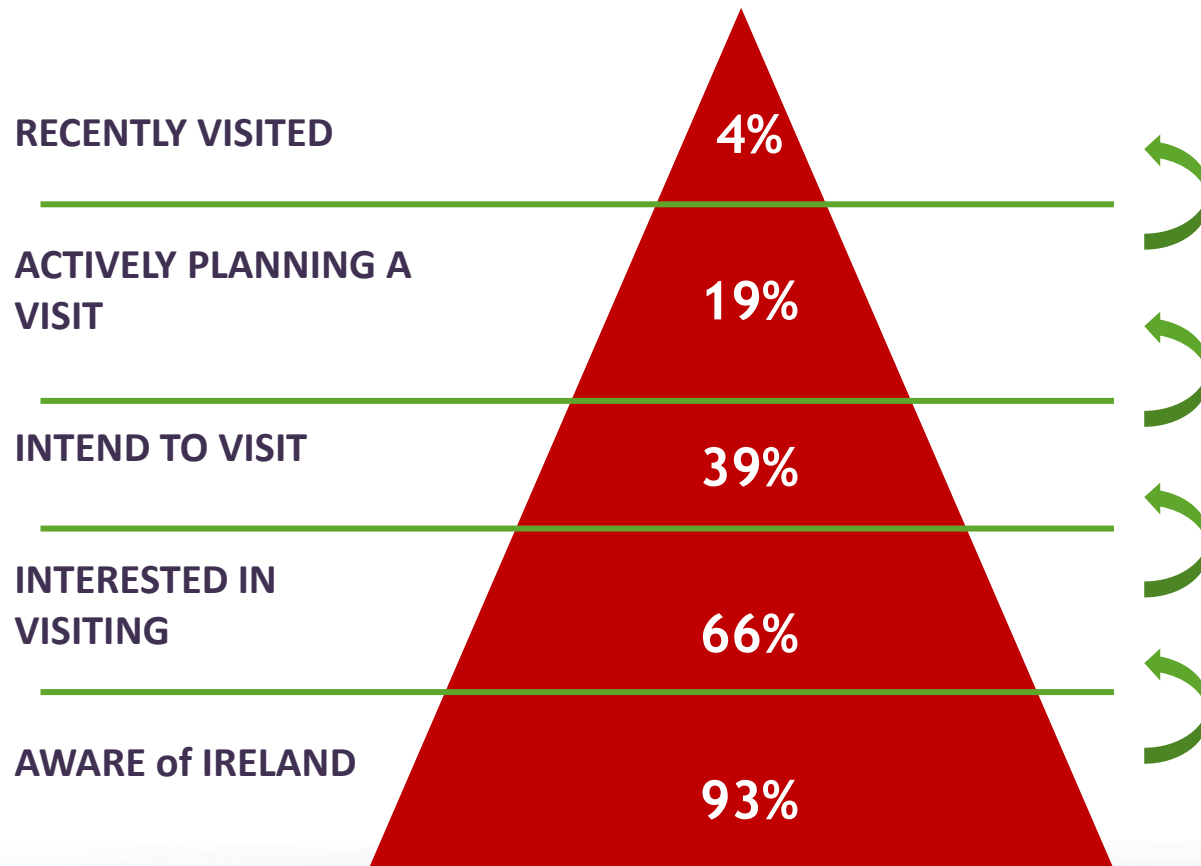
Our share of outbound visitors has also declined markedly



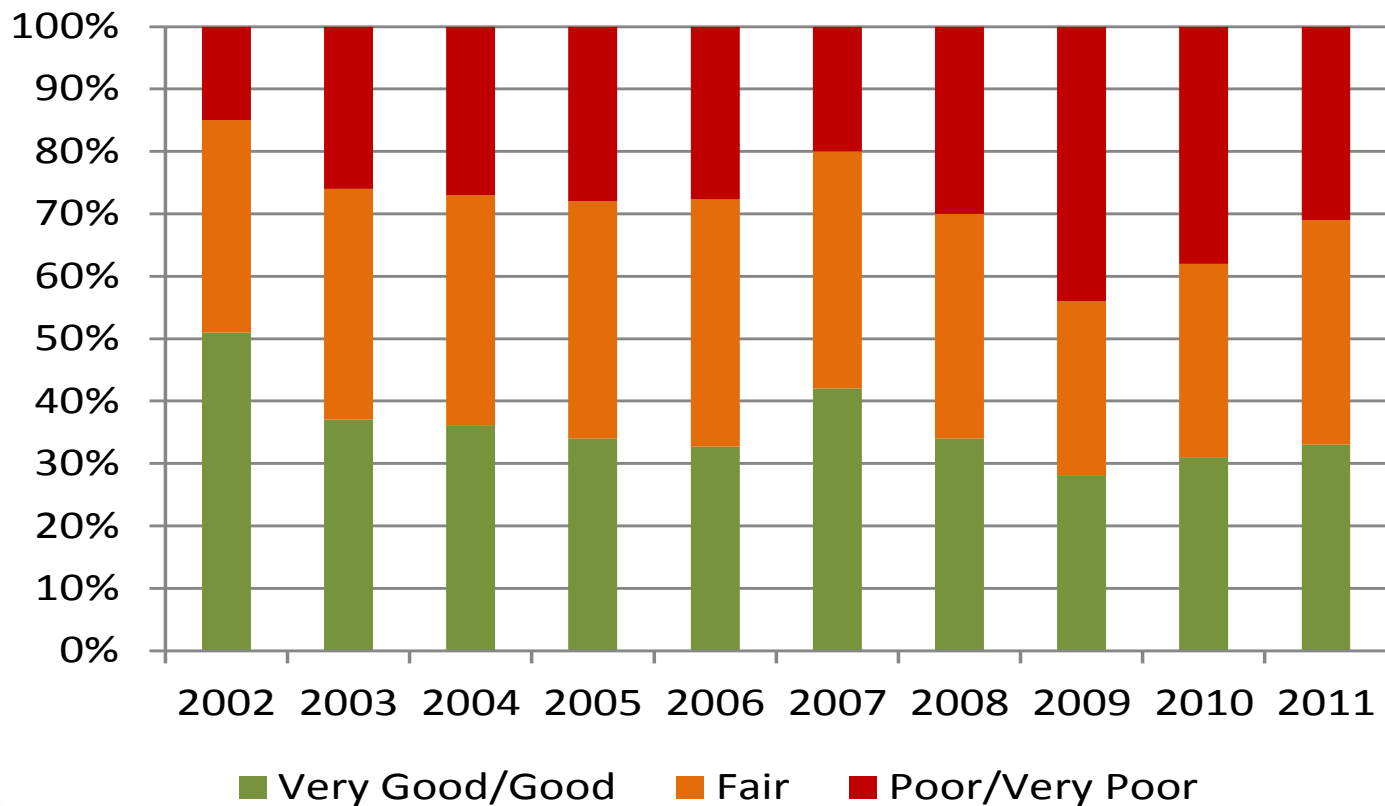
Competition for the available holidaymakers has intensified



The holiday purchase 'funnel' was our key marketing metric



GB Visitors' Perception of Value For Money in Ireland





› The GB market



Our analysis – the evidence!

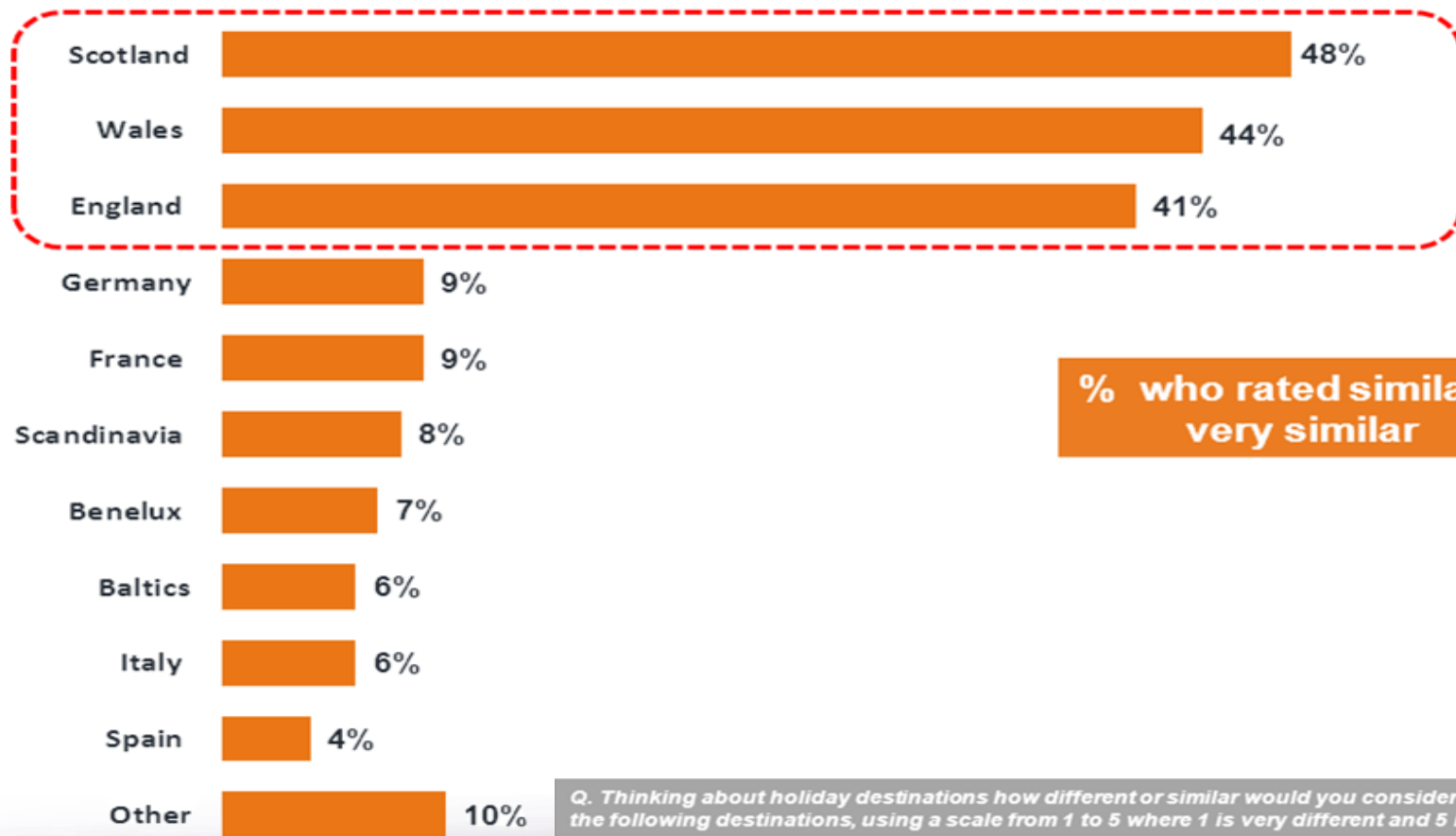
› The game-changing strategy

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**We are mainly competing
with GB and its regions**

› **Destinations Considered similar to Ireland**

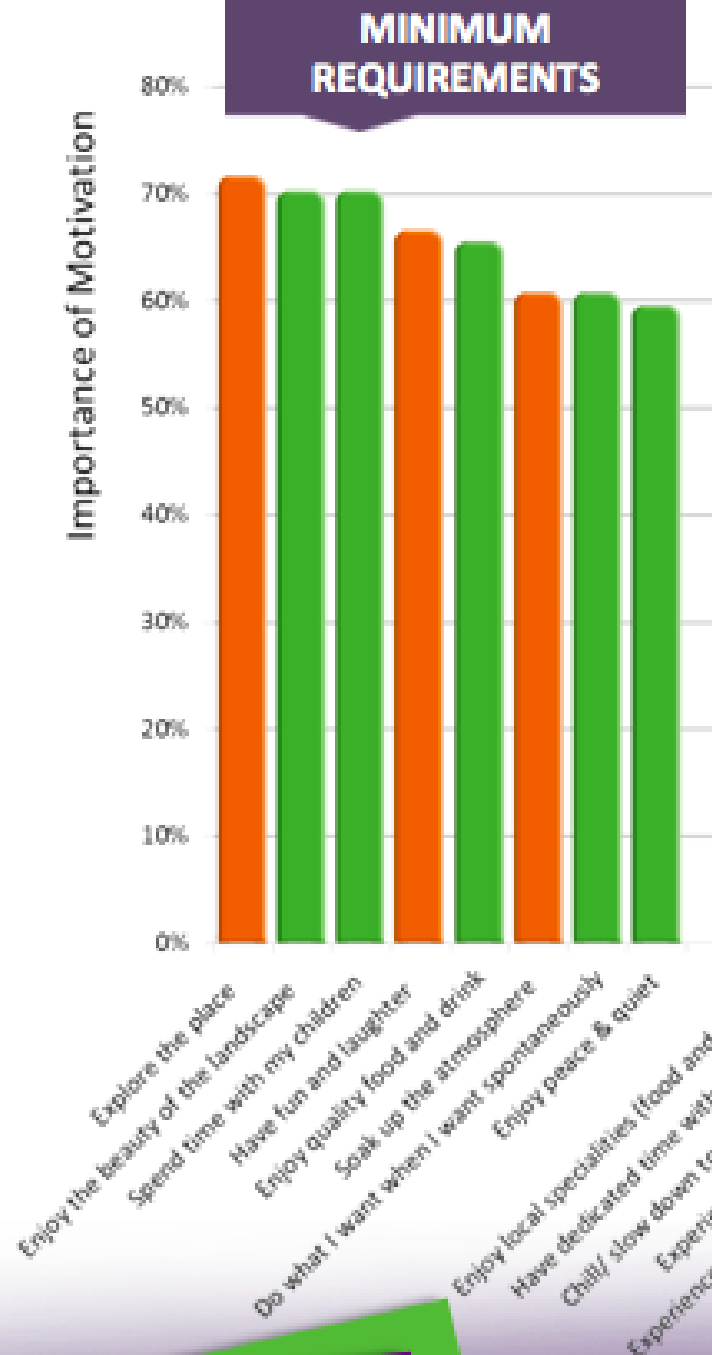


Q. Thinking about holiday destinations how different or similar would you consider Ireland to be to the following destinations, using a scale from 1 to 5 where 1 is very different and 5 is very similar?

Visitors are motivated by many things, but some are 'minimum requirements'



Motivations



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We are good at (some) things, but they don't motivate many visitors

CORE REQUIREMENTS

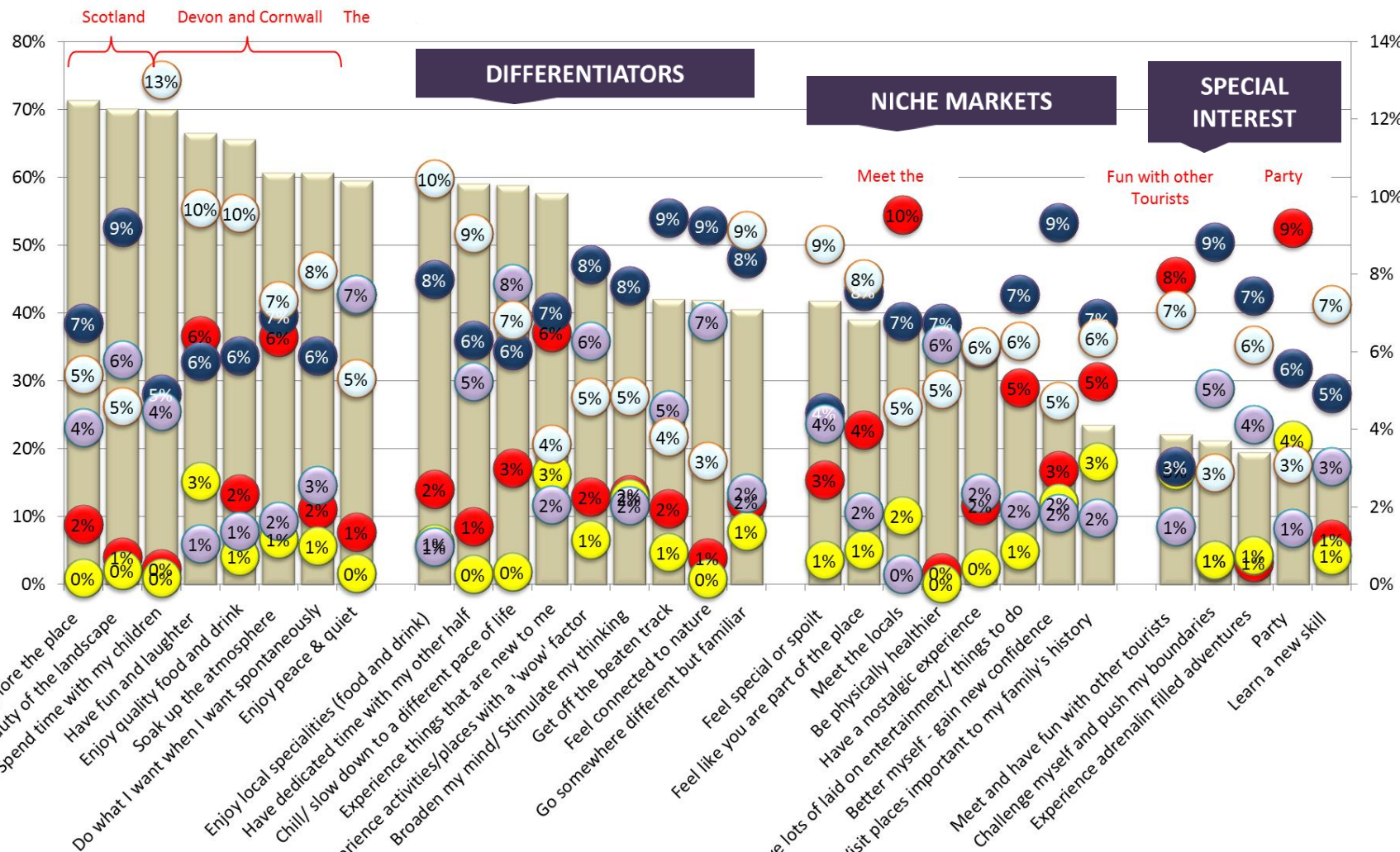
DIFFERENTIATORS

NICHE MARKETS

SPECIAL INTEREST

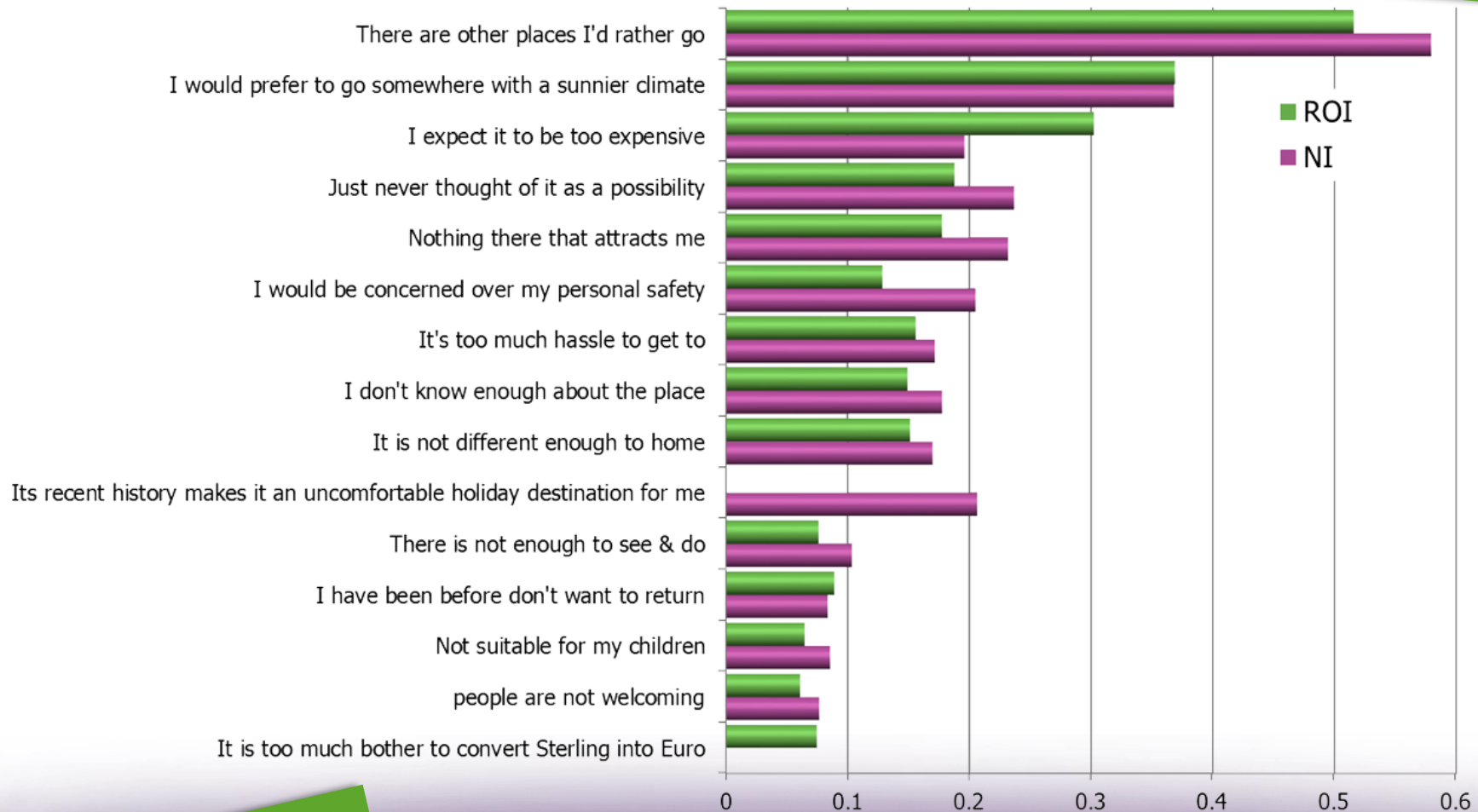
Importance of Motivation

People Perceiving Destination as Best



■ % strongly motivated by ■ % stating ROI is best ■ % stating NI is best ■ % stating Scotland is best ■ % stating Lake District is best ■ % stating Devon & Cornwall is best

Barriers to visiting the Island of Ireland





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Our new strategy

- › **The destination brand**
- › **Our target consumer**
- › **Communications**
- › **Product development**
- › **Delivering value**



The majority of destinations use the 'Masterbrand' model

MASTERBRAND

All Products carry brand name

SOURCE BRAND

Brand and product are equal

ENDORSED BRANDS

Masterbrand -lesser role than product

PRODUCT BRANDS

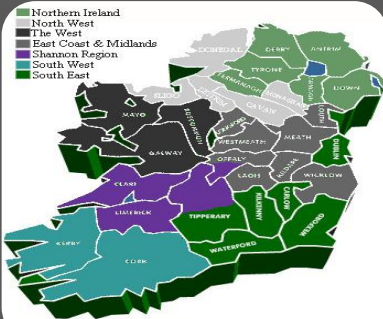
Masterbrand is not represented

COHERENCE

INDEPENDENCE



There are four main ways of grouping what we offer



GEOGRAPHICAL

Where could I go?



HOLIDAY TYPE/ BEHAVIOURAL

What type of holiday do I want?



NEEDS & VALUES

What are my deeper holiday needs?



EXPERIENTIAL

What kind of experience do I want?

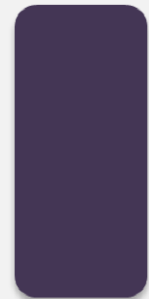
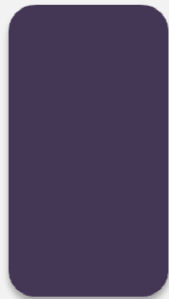


We have also adopted a
'masterbrand' model

GLOBAL 'UMBRELLA' MASTERBRAND

Values Ireland Delivers: Authenticity, Stimulation, Engaging
People, Diverse Experiences

THE ISLAND OF IRELAND



GEOGRAPHY

TYPE OF HOLIDAY



Focussing on the Relevant 'Experiences' for GB visitors

Animation & Buzz

Discovering for myself

Exploring beauty



EXPERIENTIAL PILLARS

What kind of
experience does
the visitor
want?

VIBE OF THE CITY

AWAKENING THE SENSES

LIVING HISTORICAL STORIES

CONNECTED TO NATURE

CONNECTING WITH THE PEOPLE OF IRELAND



Our 'masterbrand' is
underpinned by experiences

GLOBAL UMBRELLA MASTERBRAND

Values Ireland Delivers: Authenticity, Stimulation, Engaging
People, Diverse Experiences

THE ISLAND OF IRELAND

Awakening the
Senses

Connecting with the
People of Ireland

Getting Active in
Nature

The Vibe of the City

Living Historical
Stories

GEOGRAPHY

TYPE OF HOLIDAY



SOCIAL ENERGISERS



CURIOSLY CULTURAL



GREAT ESCAPERS



TOP TENNERS



NATURE LOVERS



SPOIL US



EASYGOING SOCIALISER



**We will need a distinct proposition
for each of the three segments**

1 SOCIAL ENERGISERS

For people who are seeking fun and excitement, Dublin & Belfast not only deliver an iconic night time experience, but also an extraordinary day time experience because of the opportunities for adventure inside the city and close by.

2 CURIOUSLY CULTURAL

For people who want to discover culture for themselves, Ireland delivers a rich depth and varied set of experiences that bring history and culture to life and are within easy reach one from the other

3 GREAT ESCAPERS

For explorers who want to immerse themselves in a combination of outstanding natural phenomena and unrivalled historical sites, it couldn't be easier or more accessible than in Ireland

We will need to offer very tailored communications to each segment

- Develop a highly targeted communications strategy, including media and messaging, focused on the specific segments & propositions communicating the relevant experiences by segment
- Develop a creative strategy that will 'jolt' each segment from consideration to conversion. A new creative approach need to be developed against the amended propositions for each segment.
 - The current campaign is not converting non visitors to travel
 - The 'Jump into Ireland' line resonates with Social Energisers, is understood but not appreciated by the other two .
- The communication channel targeting will now be highly tailored to the new segments with an increased focus on content dissemination and interaction.



Product development needs to deliver experiences for each of the three segments

Brand

IRELAND HOLIDAY BRAND

Consumer Segmentation

DISTINCTIVE EXPERIENCES BY SEGMENT

CONTENT

Product Development Streams:

EVENTS

ANIMATION

INTERPRETATION

EXPLORATION

Trade & Stakeholder Engagement

Underpinned by:

ACCOMMODATION

INFRASTRUCTURE & ACCESS

FOOD



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Measuring success – transparency!



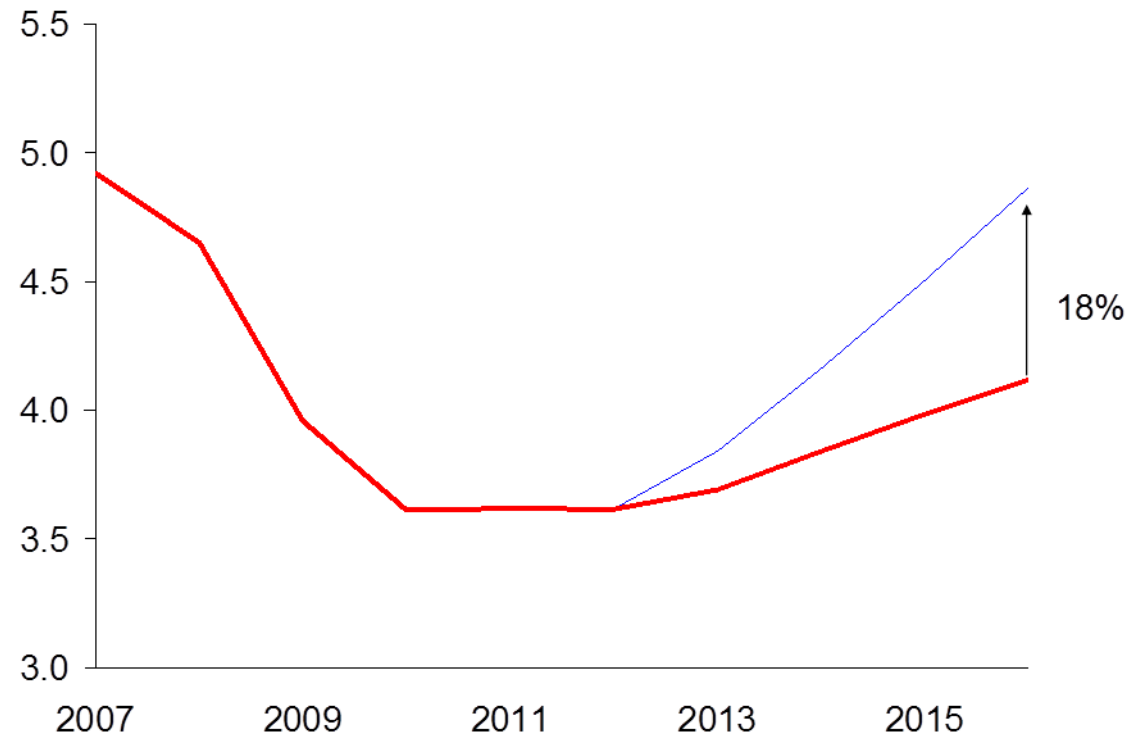
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**We believe that this plan can
deliver a 'step-change' in visitors
from GB**

GB arrivals in Island of Ireland

mns

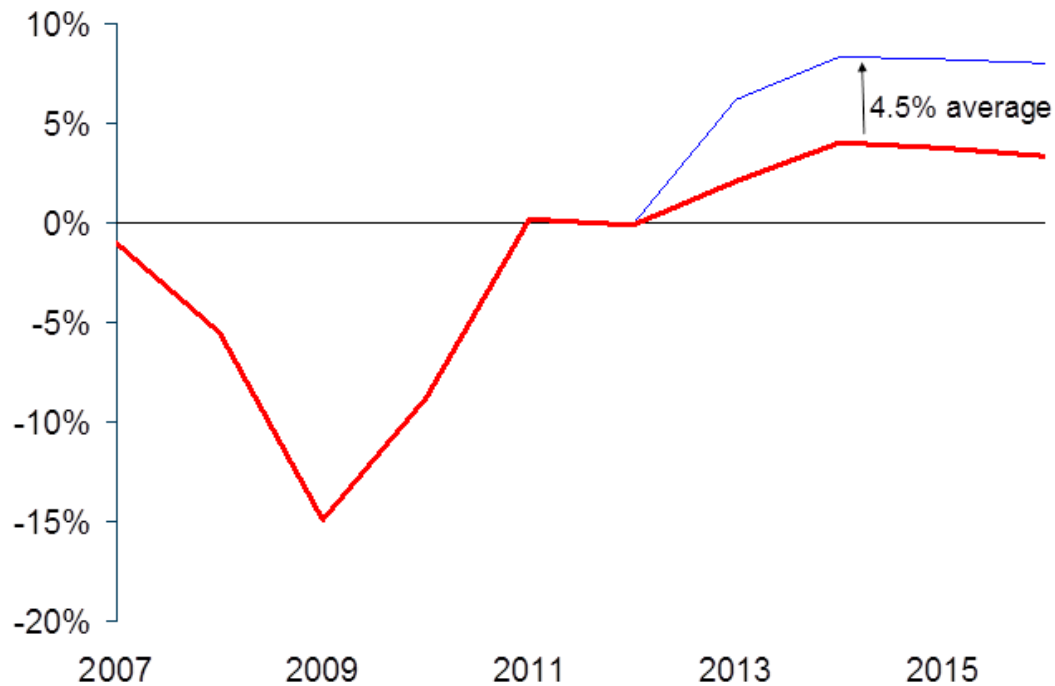


Source: Tourism E Group

We believe that this plan can deliver a 'step-change' in visitors from GB

GB arrivals in Island of Ireland

% growth



Source : Tourism Economics

Summary

- › Gaining share from 'domestic' competitors
- › Sharper focus on tighter consumer segments
- › From 'product development' to 'experience development'
- › Singular focus on delivering 'value'

Thank you