

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:



IRISH FERRIES



abbeytours
experts on ireland



Google



National
Trust



National Tourism Development Authority



northernireland
tourist board





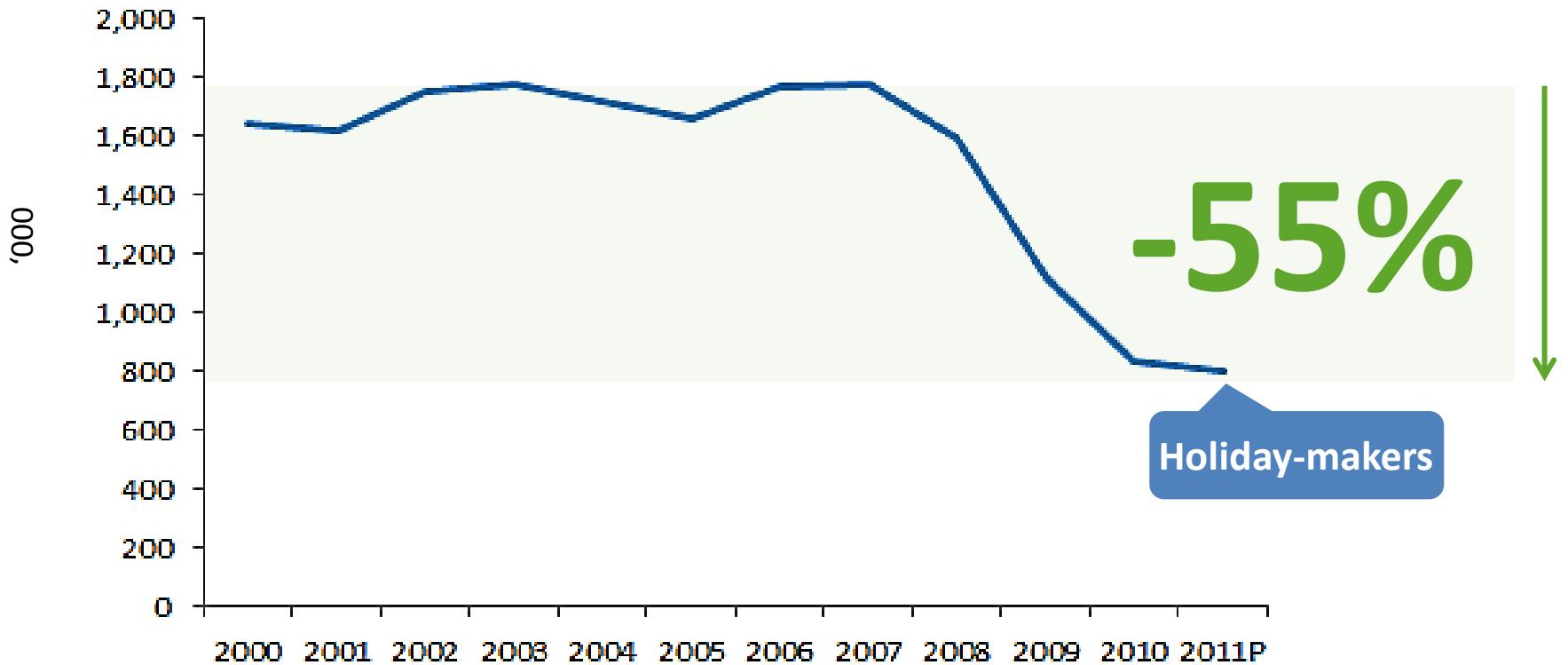
- › The GB market
- › Our analysis
- › The game-changing strategy
- › Measuring success



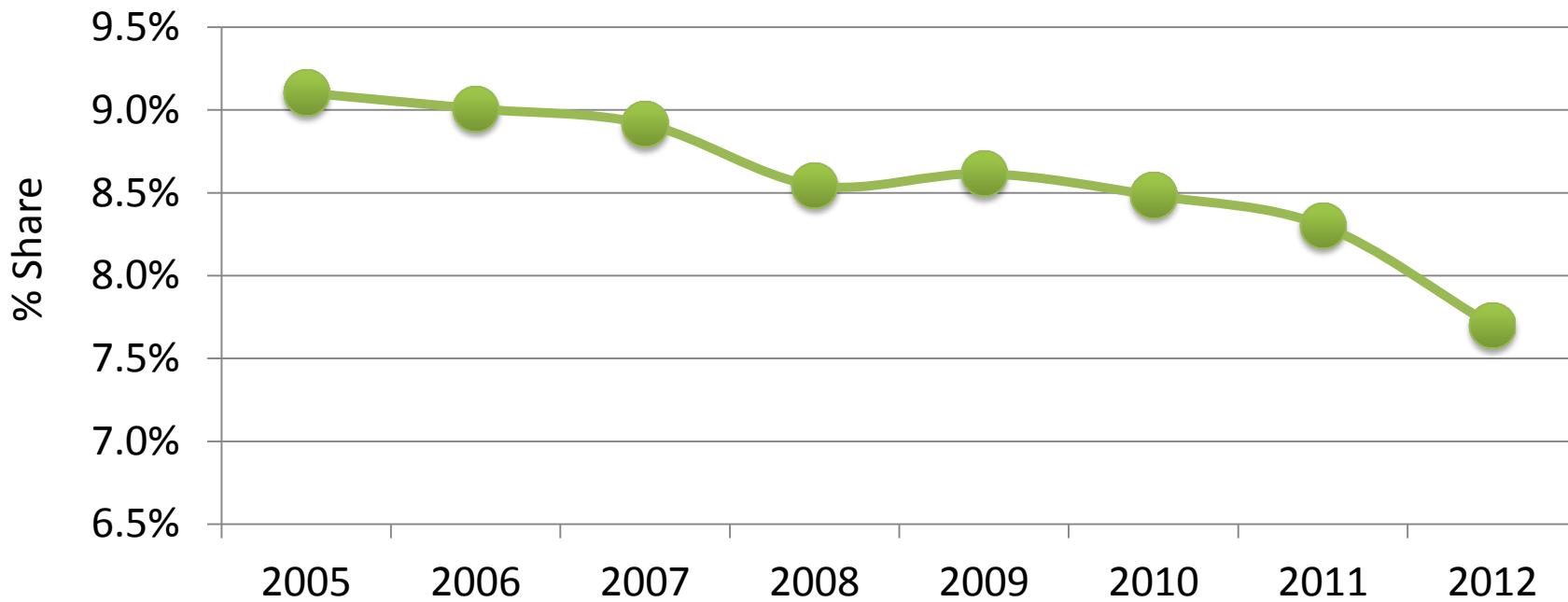
The GB market – context and performance!

- › Our analysis
- › The game-changing strategy
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Holiday-makers from GB have declined by 55% in five years



*Our share of outbound visitors
has also declined markedly*

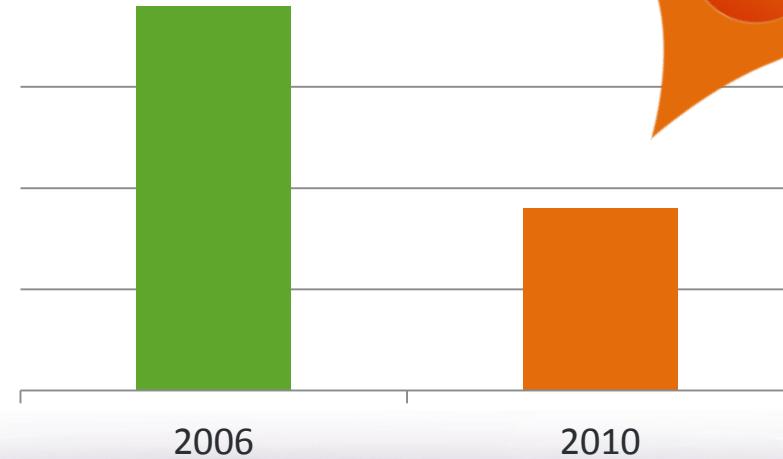


Competition for the available
holidaymakers has intensified

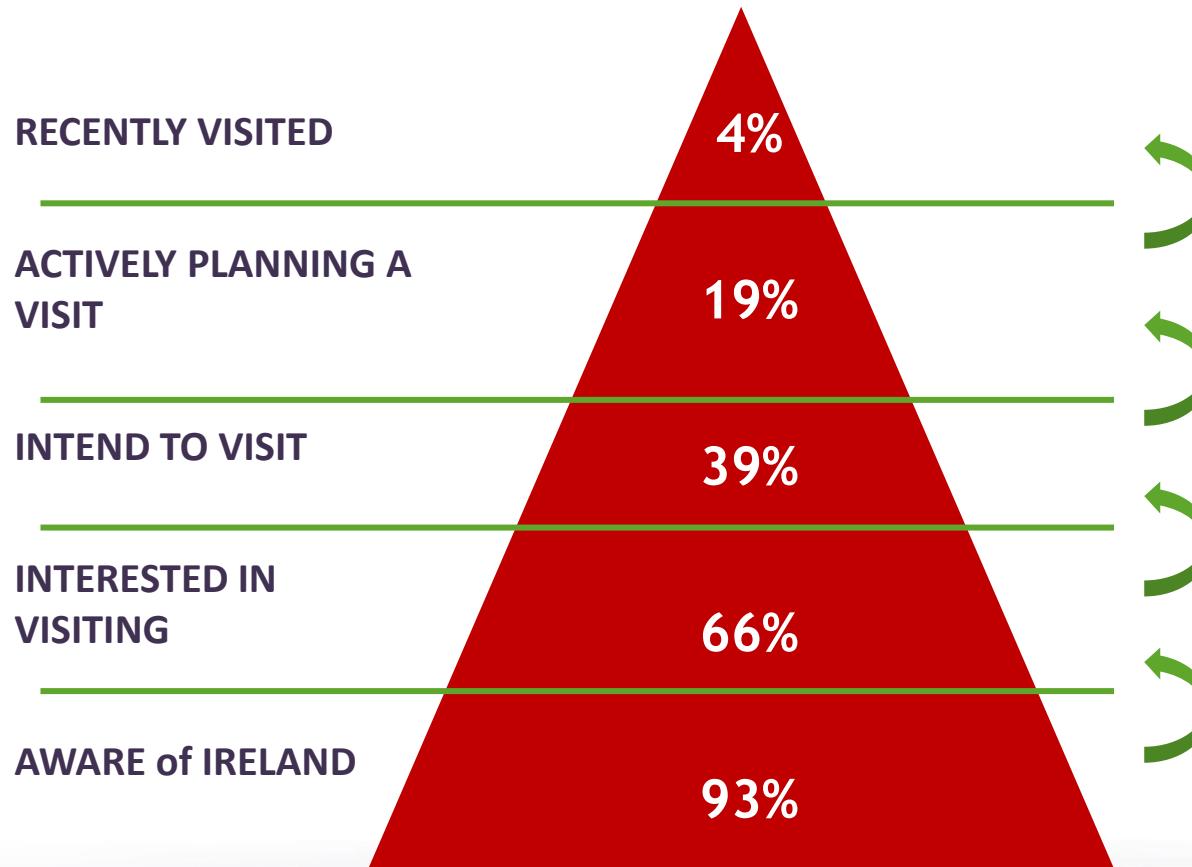
54 %

% advertising share of voice,
Ireland on GB TV

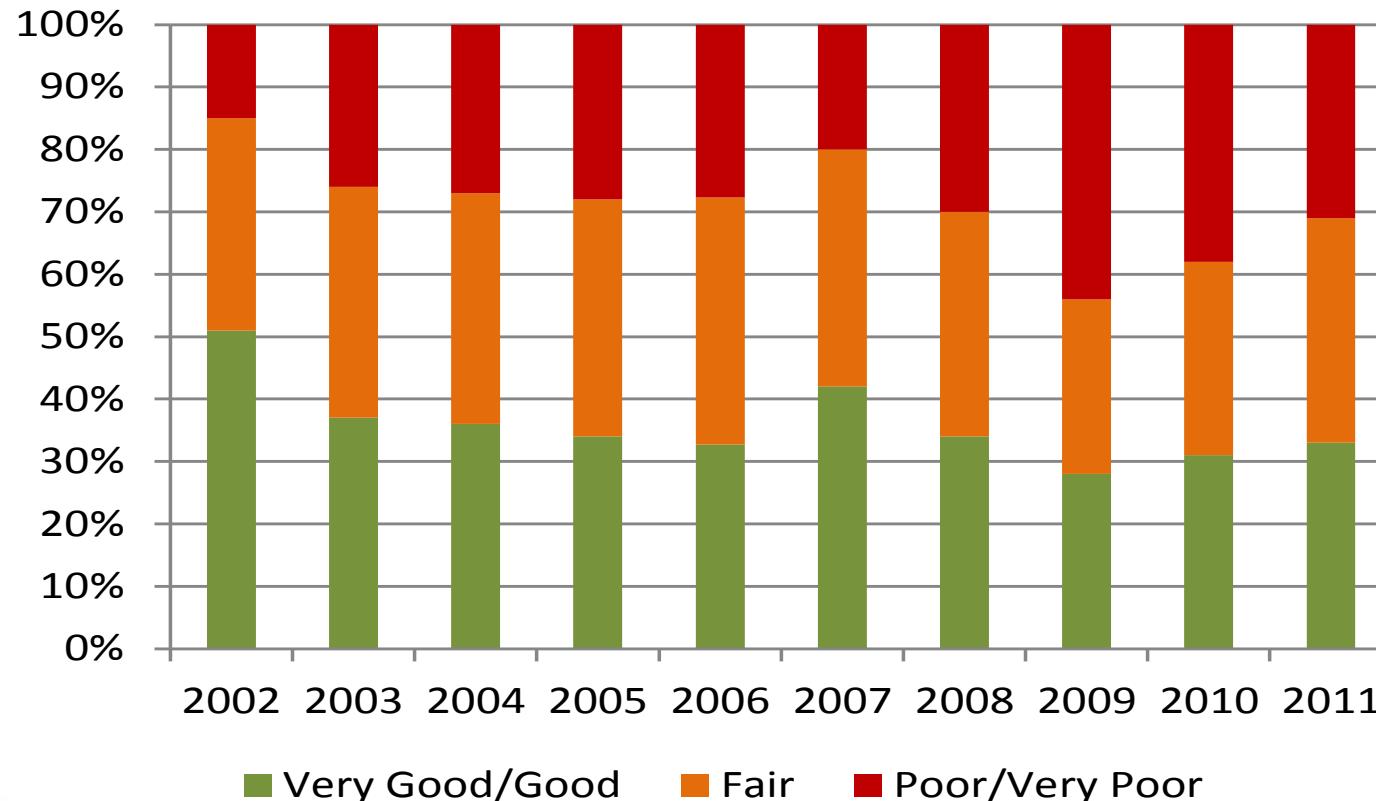
21 %



*The holiday purchase 'funnel'
was our key marketing metric*



GB Visitors' Perception of Value For Money in Ireland





- › The GB market

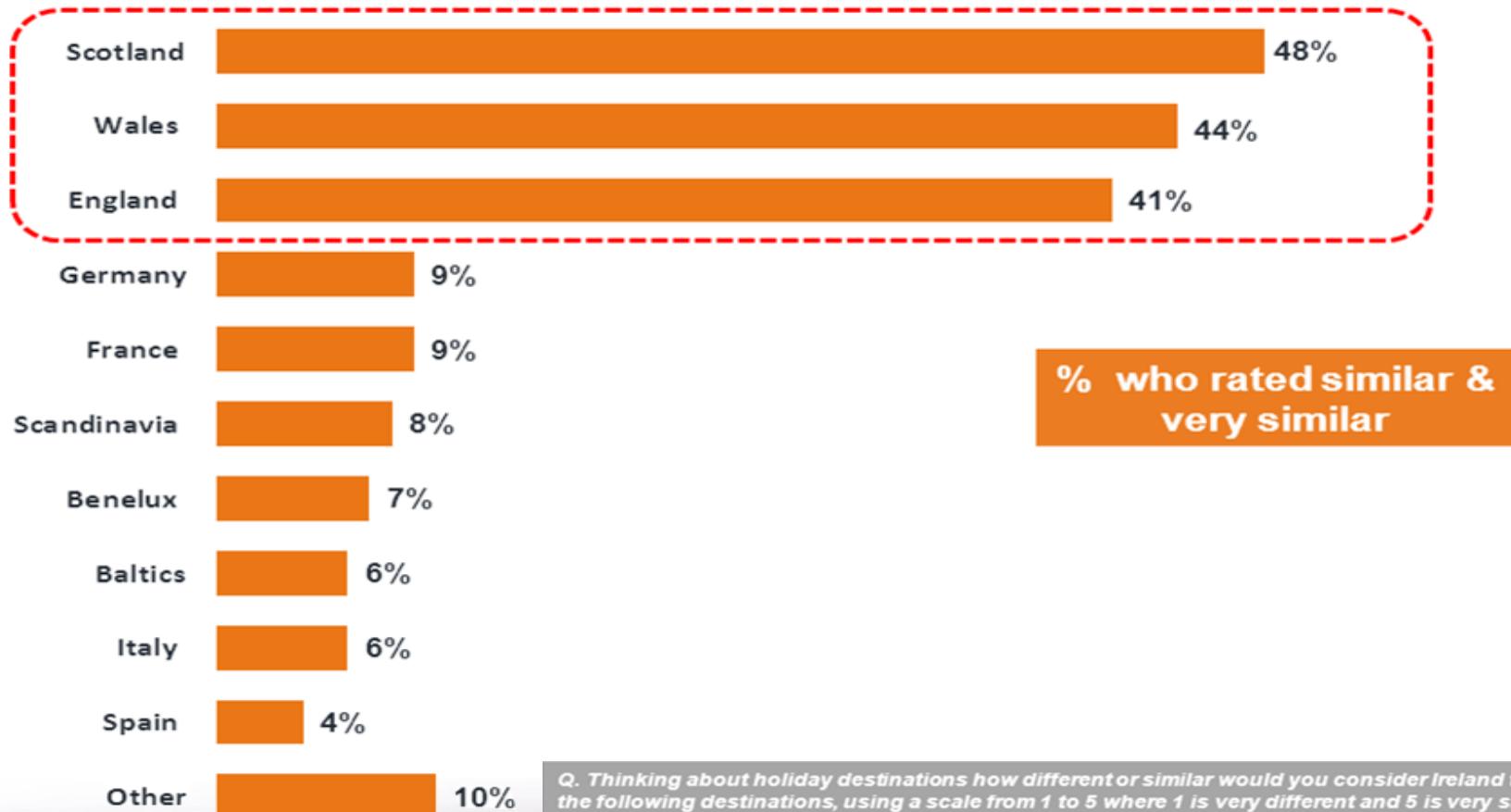


Our analysis – the evidence!

- › The game-changing strategy
- › Measuring success

We are mainly competing with GB and its regions

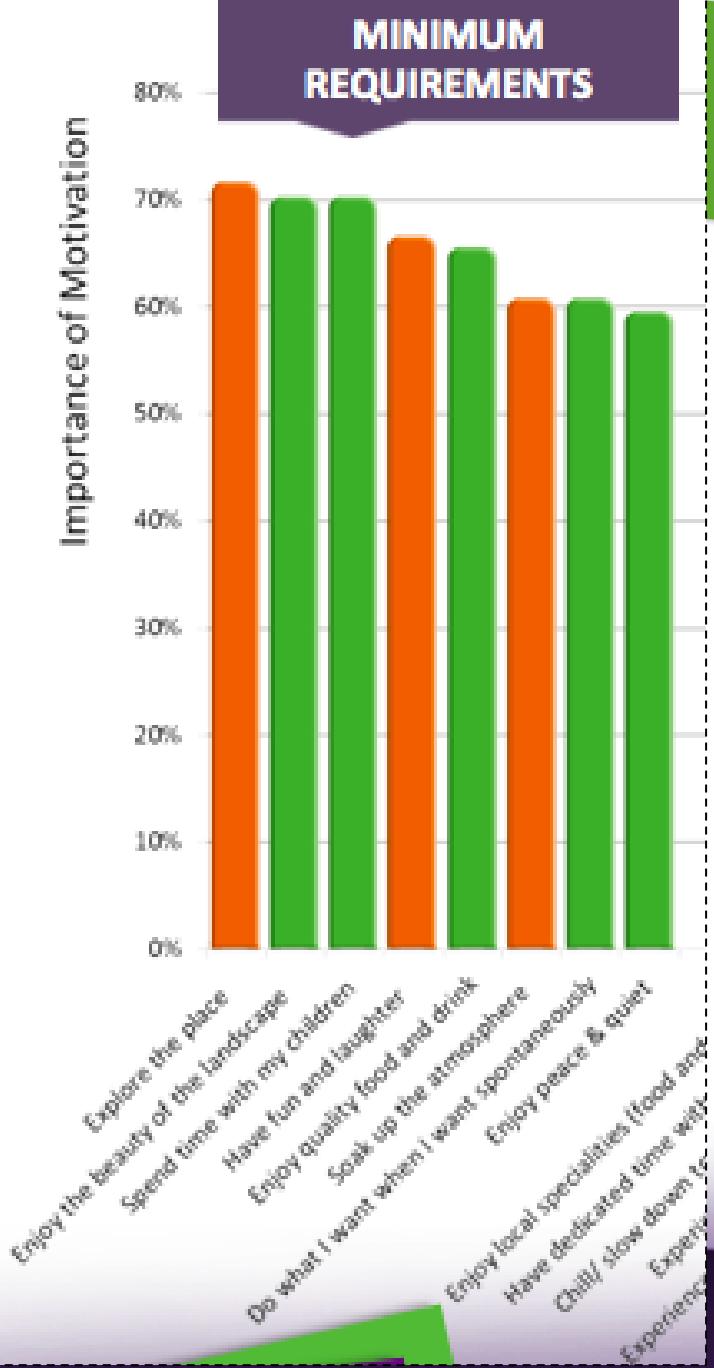
Destinations Considered similar to Ireland



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

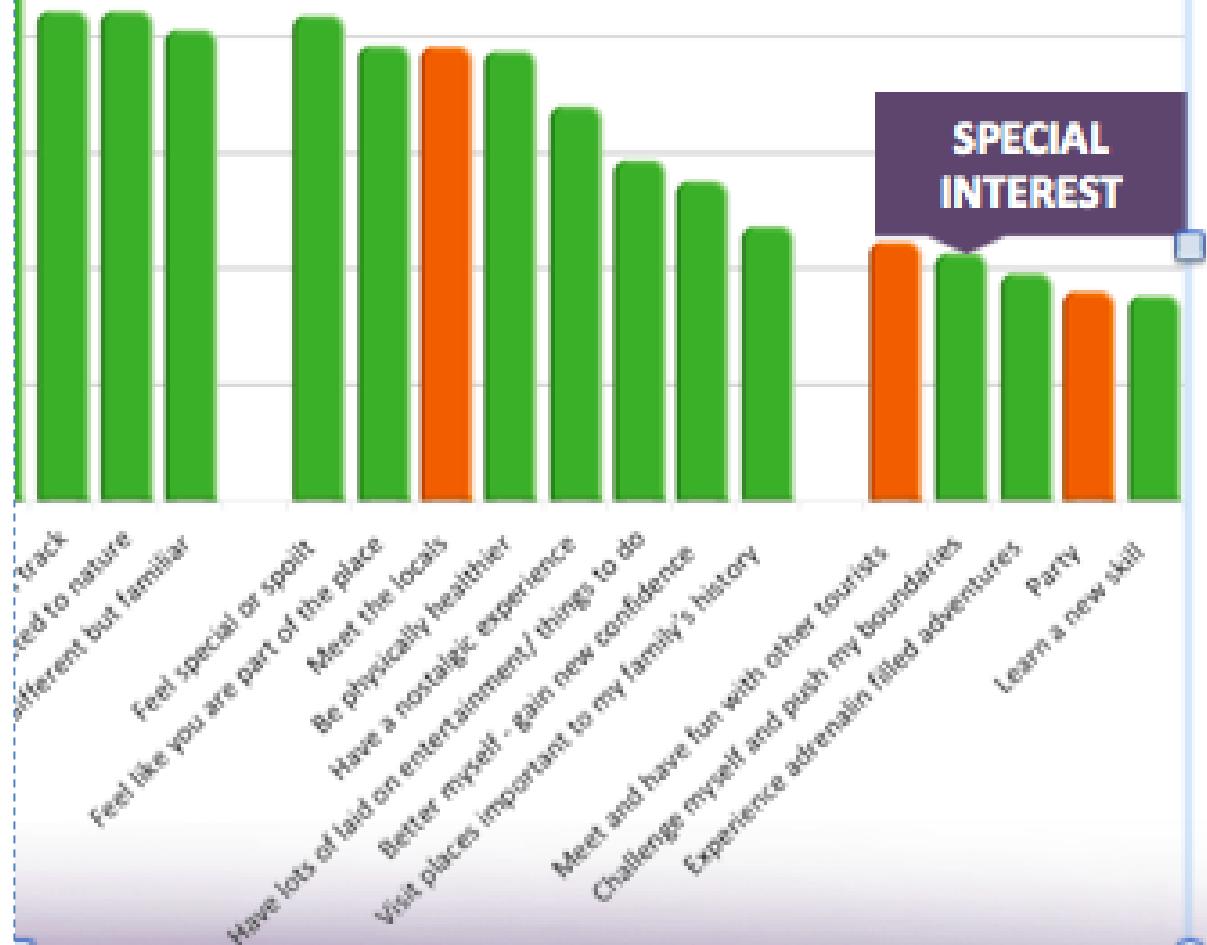


MINIMUM REQUIREMENTS



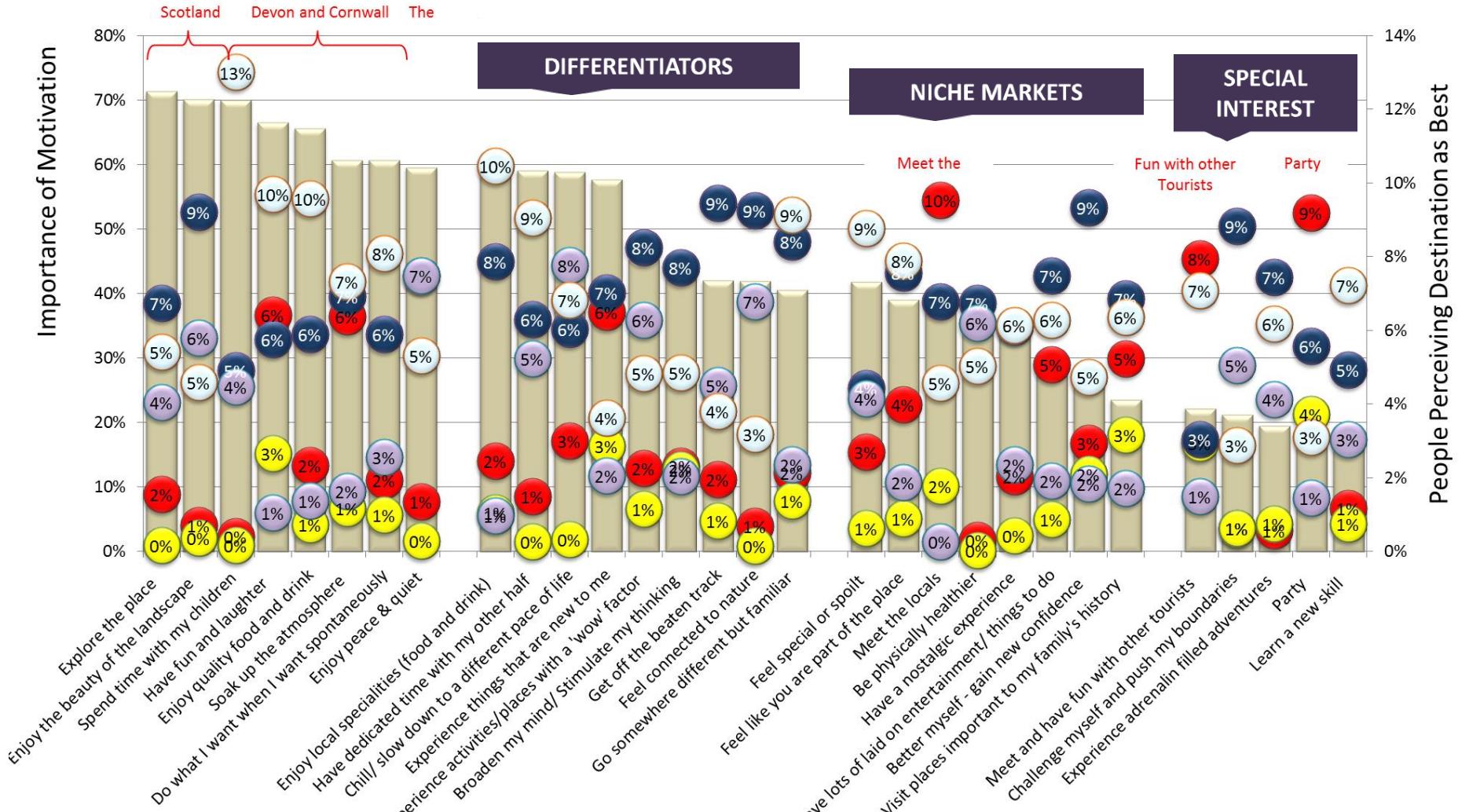
Motivations

NICHE MARKETS



Motivations

CORE REQUIREMENTS



Barriers to visiting the Island of Ireland





- › The GB market – context and performance
- › Our analysis



The game-changing strategy

- › Measuring success

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

COHERENCE



Holland



Mexico



Egypt



Germany
Land of Ideas



SOURCE BRAND

Brand and product are equal



ENDORSED BRANDS

Masterbrand -lesser role than product



Visit France



PRODUCT BRANDS

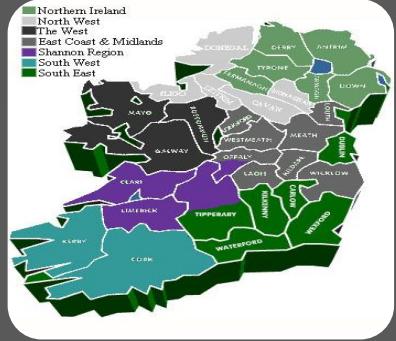
Masterbrand is not represented

INDEPENDENCE



VISIT FLORIDA

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?

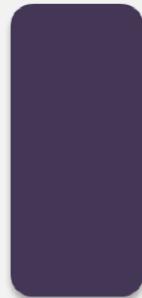


We have also adopted a
'masterbrand' model

GLOBAL 'UMBRELLA' MASTERBRAND

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

THE ISLAND OF IRELAND



GEOGRAPHY

TYPE OF HOLIDAY

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



CURIOUSLY 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

Underpinned by:

ACCOMMODATION

INFRASTRUCTURE &
ACCESS

FOOD

Trade &
Stakeholder
Engagement



- › The GB market – context and performance
- › Our analysis
- › The game-changing strategy

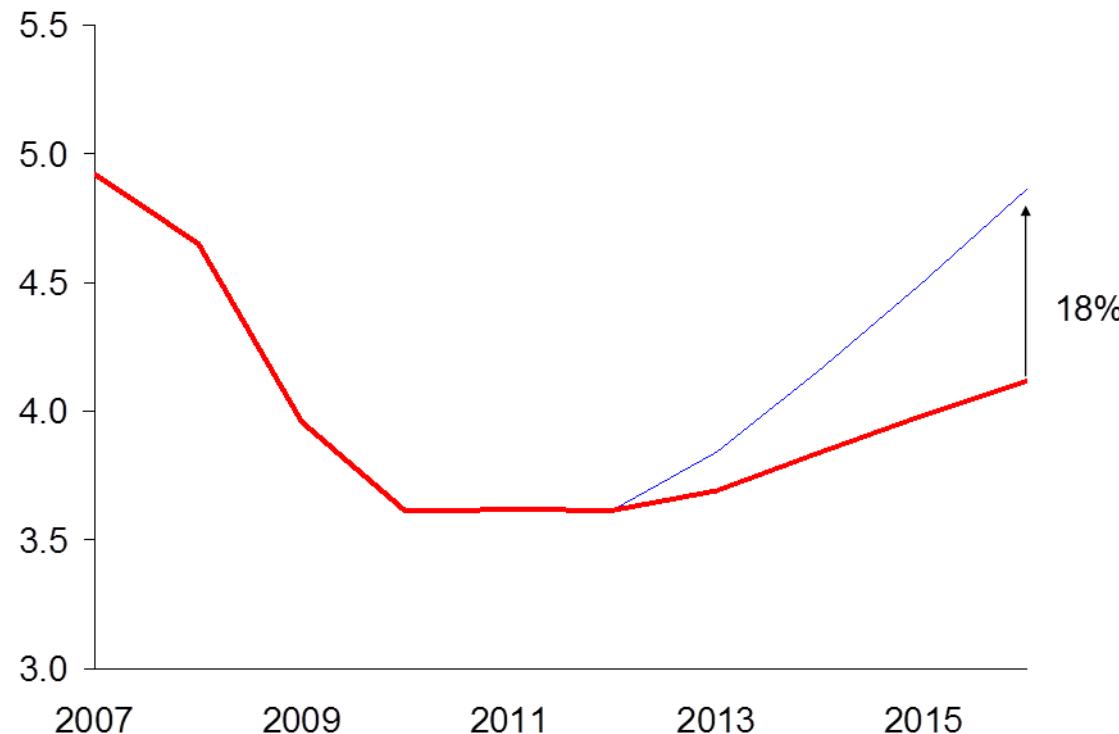


Measuring success – transparency!

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

GB arrivals in Island of Ireland

mns



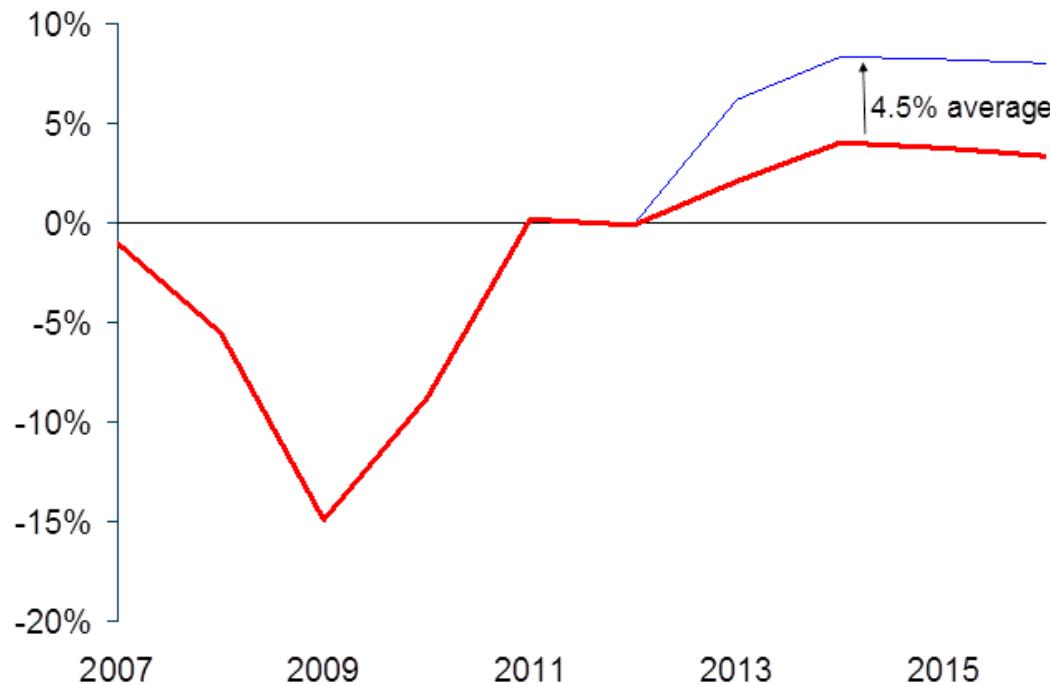
Source: Tourism E Group



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

GB arrivals in Island of Ireland

% growth



Source : Tourism Economics

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

Thank you