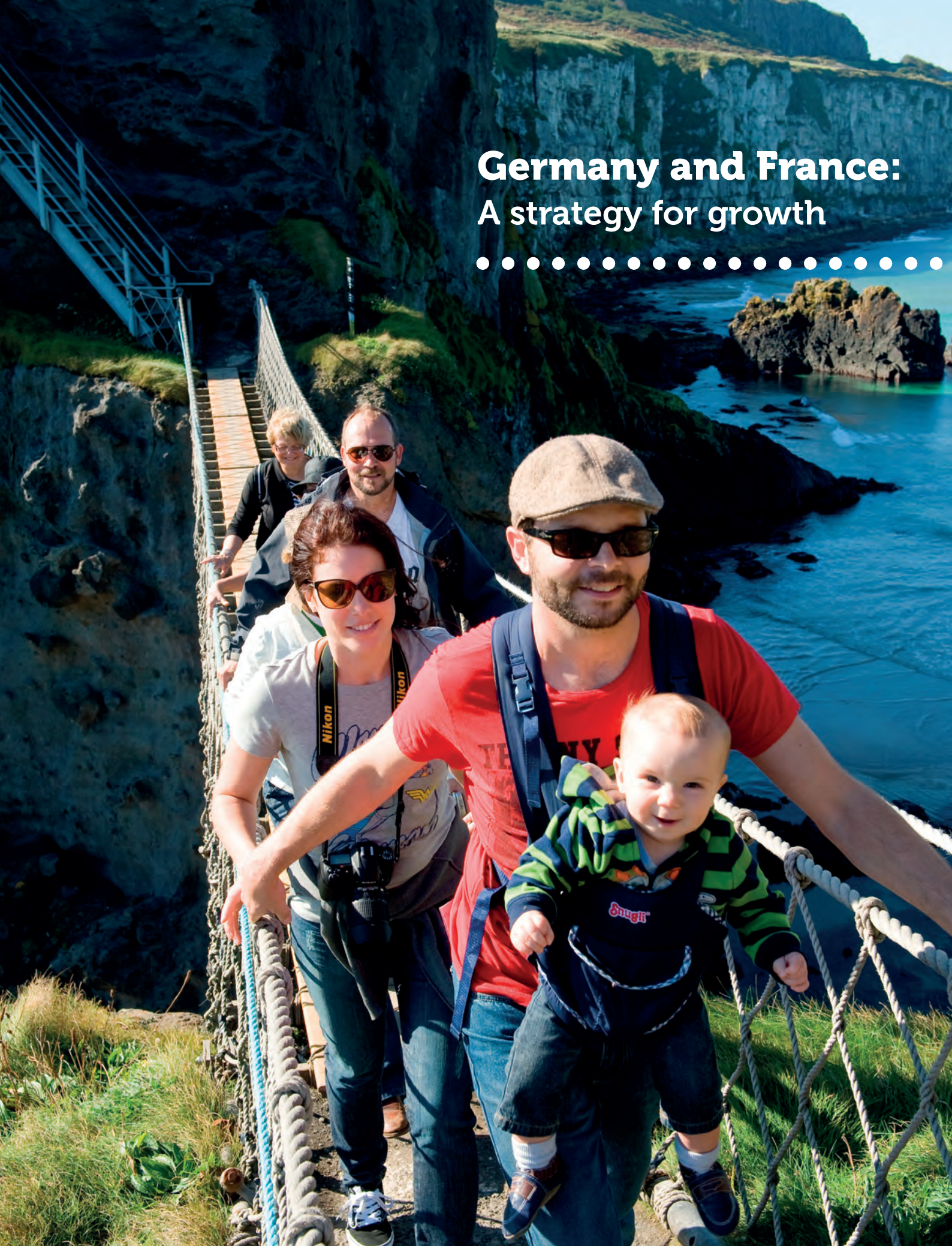


# Germany and France: A strategy for growth

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# introduction



Dunluce Castle, Co. Antrim

## Introduction

Tourism is the largest indigenous industry on the island of Ireland and employs more than 240,000<sup>1</sup> people. It is worth an estimated €5 billion/£4.1 billion a year to the island of Ireland. Our sector supports thousands of businesses, both directly and indirectly, and is a key contributor to economic and social wellbeing. Growth from tourism will be a key driver of future economic development and job creation in both the Republic of Ireland and Northern Ireland.

All of us in the tourism sector are committed to targeting markets with high potential to grow revenue and visitor numbers, such as those in France and Germany. In 2012, these countries together contributed 12 per cent of all visitors to the island of Ireland and 13 per cent of revenue.

Recent performance has been strong, with Germany and France delivering +35 per cent and +40 per cent growth respectively in promotable visitors<sup>2</sup> since 2010. The island of Ireland competes well in these markets on fundamentals such as brand appeal, visitor experience, distribution, competitiveness and access. We believe both markets can deliver sustained growth over the next three years.

## An integrated strategy for France and Germany

Set against this background, Tourism Ireland in conjunction with Fáilte Ireland, the Northern Ireland Tourist Board, the Irish Tourism Industry Confederation, and commercial trade and industry partners have completed a comprehensive appraisal of the German and French markets. Together, we have developed a focussed plan to attract more French and German holidaymakers, deliver steady revenue growth and increase market share.

In the course of this process, we:

- Carried out a thorough review of existing market research and intelligence
- Conducted original research, which focussed on consumer motivations and which has contributed to the development of a segmentation strategy
- Held a series of working sessions to design a strategy for growth by and for all those involved in our industry

This plan outlines the actions necessary to deliver sustained growth for France and Germany over the next three years. We are all – agencies, organisations, partners and companies – committed to making consistent and concerted efforts to realise this growth. By working together towards our agreed goals, we can maximise the potential return from the German and French markets. This will help both economies on the island of Ireland to develop and grow.

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1 Department of Transport, Tourism and Sport (DTTAS) and Northern Ireland Statistics and Research Agency (NISRA)

2 Promotable visitors include holidaymakers, discretionary business travellers and students of English language training (ELT)

## Executive summary

Germany and France are the island of Ireland's third- and fourth-largest markets, respectively. Between 2010 and 2013, promotable visitors from France and Germany to the island grew by +40 per cent and +35 per cent respectively. Travel to Western Europe grew by just +5 per cent over the same period from these markets.

We have set ambitious targets for 2014 to 2016, which are:

- Growth in promotable revenue of +29 per cent from Germany and +18 per cent from the French market
- A +24 per cent increase in promotable visitors from Germany and a +18 per cent increase from France

### Three key drivers of growth

1. **Motivation-based segmentation** – we will focus on the consumer segments we have identified as offering the best-prospects and develop a strategy guided by our insight into and understanding of what motivates consumers
2. **Targeted motivating communications** – we will produce specific and targeted communications designed to reach, resonate and influence best-prospect segments to travel to the island of Ireland
3. **Distinctive holiday experiences** – we will offer experiences that targeted consumers would seek out and value highly

Improved access and distribution will underpin these three drivers of growth. The island of Ireland will need to remain competitively priced to ensure the brand's value-for-money rating is comparable or better than that of key competitors.

### From strategy to action

We have specified and agreed areas of focus to build on the three key drivers of growth outlined above.<sup>3</sup> These are as follows:

- Segmentation of target consumers in France and Germany
- Brand
- Product and experience
- Industry and trade engagement
- Distribution and access.

### Segmentation

Our new approach to segmentation will drive all communications, channel selection, product development, experience delivery and industry engagement in France and Germany (shaped to meet the nuances of both markets – see Appendix 1). It will target two main best-prospect segments:

- **Culturally Curious**, who want to broaden their minds and expand their experiences through landscape, history and culture
- **Great Escapers**, whose principal motivation is to enjoy the beauty of breath-taking landscapes

In addition, both markets have identified a third segment with strong potential, particularly for short breaks and during off-peak periods:

<sup>3</sup> The market assessment and strategies focus on holidaymakers. The market teams will also implement separate strategies to address discretionary business travel and English language training (ELT) (France).

- **Social Energisers**, who want to enjoy a fun time with friends in places that are new, unique and vibrant

## Brand

The island of Ireland brand is strong in both France and Germany. However, improving brand knowledge and ensuring our brand continues to stand out remain key challenges in a competitive marketplace. Through our brand architecture framework (see Appendix 2), we have identified specific holiday propositions that strongly resonate with each priority segment in Germany and France.

This framework will guide the development and prioritisation of communications, holiday itineraries, and product and experience development and delivery. Protecting and developing authenticity is paramount to the success of the island of Ireland brand.

## Product and experience

French and German visitors to the island report being really satisfied with their trip. The island of Ireland offers a range of products and experiences that resonate with and motivate German and French travellers. Improved value for money ratings in the past three years have contributed to reported satisfaction levels.

Finding ways to stand out from our competitors will be a priority for those of us in the tourism industry during product and experience development. Our improved insights into what really motivates our priority segments will guide how products and experiences are developed and delivered. We will also carry out ongoing benchmarking and

study best practice in competitor destinations to guide and inform product and experience development.

## Industry and trade engagement

We plan to share key insights and information about the French and German markets with our island of Ireland based and overseas trade partners. By better understanding the needs and motivations of the priority segments, our partners will be confident in the development of new itineraries, new experiences and new product offerings. This steady stream of innovation will enable us to stand out more from our competitors over time.

## Distribution and access

Ireland is reasonably well served in terms of distribution; holidays to Ireland are widely available to consumers in both markets, but the distribution base must be developed on an ongoing basis. More specifically, there is a need to increase programming of Northern Ireland by tour operators in both France and Germany.

To improve access, we will focus on strategically important air and sea routes from the French and German markets. We will identify new route development opportunities, capacity and seasonal requirements because these will influence delivery of the target level of growth.

## Implementation

Agencies and industry are committed to continuing to co-operate to implement this plan and truly realise the growth potential of the French and German markets.



# current performance



Enniskillen Castle, Co. Fermanagh

## The German and French tourism markets

The island of Ireland's recent performance in the German and French markets has been positive. Aggregated growth for 2010 to 2013 from both

markets in terms of promotable visitor numbers was +37 per cent. This is significantly ahead of the +7.9 per cent growth seen in leisure travel to Western Europe. Figures 1 and 2 below summarise the growth in visitors and promotable visitors.

**Figure 1: German market performance 2010–2013\***

Island of Ireland	2010	2011	2012	2013 Forecast	% change 2013/10	W. Europe % change 2013/10
Visitors (000)	399	431	451	478	+19.8%	+3.5%
Promotables (000)	245	263	308	331	+35.0%	+7.9%
ROI	242	261	307	329	+36.1%	-
NI	21	26	24	25	+19.0%	-

\*2013 figures are based on forecasts from Oxford Economics. Promotables to Western Europe are based on world leisure arrivals.

**Figure 2: French market performance 2010–2013\***

Island of Ireland	2010	2011	2012	2013 Forecast	% change 2013/10	W. Europe % change 2013/10
Visitors (000)	356	399	404	439	+23.3%	+9.4%
Promotables (000)	204	237	268	285	+39.7%	+7.9%
ROI	201	233	265	281	+39.8%	-
NI	17	25	20	22	+29.4%	-

\*2013 figures are based on forecasts from Oxford Economics. Promotables to Western Europe are based on world leisure arrivals.

The key fundamentals of brand, visitor experience, distribution and access have been pivotal in driving growth. Increased competitiveness (with our value-for-money rating improving significantly in recent years) is a key element in the island of Ireland's recent success. We must continue to deliver value for money and compete strongly. This may be especially important in relation to the

current difficult economic situation in the French market.

Northern Ireland has not enjoyed the same level of growth as the Republic of Ireland in recent years. With this in mind, we have collaborated to develop a strategy to specifically and significantly drive growth in Northern Ireland.

# targeted growth



Rock Climbing, Dingle, Co. Kerry

## Going for growth – 2014-2016 targets

Together, we have set challenging, ambitious, but feasible targets for the island of Ireland’s performance from 2014 to 2016. We will focus not only on attracting more promotable visitors (a long-standing key metric), but on generating significantly more revenue from the French and German holidaymakers who visit. The most recent Tourism Ireland Corporate Plan

2014-2016 embraces promotable revenue as the key performance metric for the organisation. Although not yet widely adopted internationally, we are confident that we can provide a sufficiently robust measure of performance against the revenue targets and an indication of share improvement. Figure 3 below gives a summary of our growth targets.

**Figure 3: German and French markets – targeted growth 2014-2016**

Island of Ireland	2013 forecast	2014 targets	2015 targets	2016 targets	Absolute % growth
<b>GERMANY</b>					
Visitors (000s)	478	495	540	581	+22%
Promotable visitors (000s)	331	354	378	410	+24%
Revenue (€/£ millions)	258/222	275/237	303/260	331/285	+29%
Promotable revenue (€/£ millions)	197/169	214/184	233/200	254/218	+29%
<b>FRANCE</b>					
Visitors (000s)	439	459	485	512	+17%
Promotable visitors (000s)	285	299	317	336	+18%
Revenue (€/£ millions)	220/189	233/200	252/217	271/233	+23%
Promotable revenue (€/£ millions)	158/136	169/146	178/153	186/160	+18%

Meeting the targets will mean that the island of Ireland’s share in Northern Europe<sup>4</sup> to move from 5.9 per cent to

6.3 per cent in Germany and from 10.5 per cent to 11.0 per cent in France.

4 Northern Europe – GB, Nordics (Norway, Sweden, Denmark, Finland, Iceland) and the island of Ireland

# model for growth



Galway Market, Co. Galway

## Key drivers of growth

Relying on current momentum will not deliver the targeted growth. Furthermore, most stakeholders, from agencies to industry, are likely to face limited resources. Our sector must commit to doing things differently and better so that the island of Ireland wins competitive advantage and stands out from other destinations.

We will collaborate closely to develop and implement strategies and actions based on a deep understanding of what motivates priority consumer segments. The island of Ireland must show it can deliver an experience that motivates French and German consumers. To achieve this, we need a strong sense of 'joined-up thinking' from brand to experience, across agencies and with industry partners at home and overseas.

Through the course of the market appraisal and in planning for future growth, we have defined three fundamental pillars. These are:

1. A **motivation-based consumer segmentation strategy** that clearly identifies the priority consumer segments
2. **Highly targeted and motivating brand communications** (content and offers) that will resonate with and influence the priority segments
3. A range of **distinctive experiences** that will motivate

target consumers and help the island of Ireland stand out from our competitors

Along with these, we have identified two further areas for ongoing improvement and development:

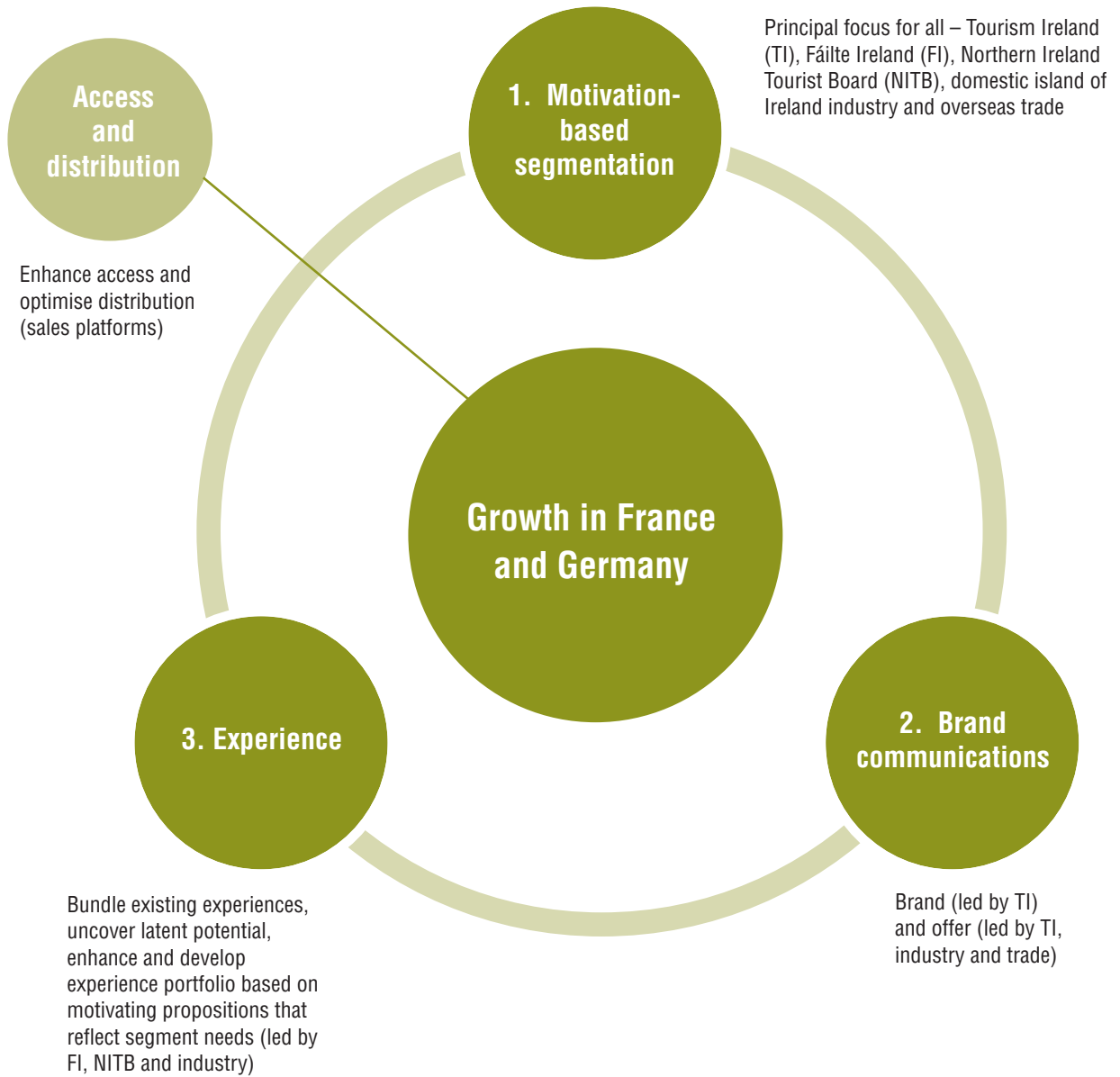
- a) **Access** – we need to continue to enhance, develop and promote air and sea access
- b) **Distribution** – we must optimise our distribution (guided by the focus on particular segments and the potential of various channels to reach them)

These five elements are inter-related. They form the basis for a model to drive growth from the French and German markets (illustrated in Figure 4).



The Little Museum of Dublin

Figure 4: Model for growth



To build distinctiveness and competitive advantage relative to other destinations and realise our growth targets for France

and Germany, the island of Ireland must excel in all of the areas shown in Figure 4 above.

# segmentation strategy



Titanic Belfast, Co. Antrim





## A new approach to segmentation

A key aspect of improving brand relevance and differentiation will be the use of our new segmentation strategy. A core focus of our work has been to identify and prioritise consumer segments in the French and German markets. This is the next phase of a global, motivation-based, consumer segmentation model for the tourism sector.

In this approach, our focus is on understanding what motivates certain groups of consumers and makes them 'tick'. This enhances the sector's capacity to influence target segments.

We carried out research in France and Germany to:

- a) Determine if the global consumer segments (as already identified) existed in both markets
- b) Measure how motivated these segments are by the idea of holidaying on the island of Ireland and what appeals to them
- c) Identify the nuanced differences between segments in the respective markets
- d) Assess the size and value of the segments

By considering these factors, we identified the best-prospect segments and determined the segmentation strategy.

## The priority segments in the German and French markets

Three segments, Culturally Curious, Great Escapers and Social Energisers, emerged as priorities within the respective markets. (See Appendix A for more detail on these segments.) By default rather than by design, the three priority segments in both markets are the same, however there are some important nuances that need to be considered for each market.

This segmentation strategy will permeate all the work we do to support the performance of the island of Ireland as a holiday destination in the French and German markets. It is the key to future success and will drive all plans and activities including:

- Communications
- Channel selection
- Product development
- Experience delivery
- Industry engagement

# brand challenges



Trinity College Dublin

## Addressing brand challenges

According to the 2013 Brand Tracker survey (see Appendix 2a), the island of Ireland brand scores well on the key dimension of 'interest'. Like many other destinations, however, it faces the challenge of translating 'interest' into 'actively planning a trip' and ultimately visiting.

Much of our future emphasis in both the French and German markets will be on translating high levels of brand affinity (interest and intent) into actual bookings. The new segmentation strategy (outlined in the previous section) will be key in addressing this.

By focussing on consumers who are more likely than average to visit the island of Ireland, our sector will be much better positioned to:

- Actively influence them to choose it as their holiday destination
- Facilitate purchase
- Deliver an outstanding experience

We must consider other dimensions of the island of Ireland brand. We have evaluated three key brand dimensions: brand knowledge, relevance and differentiation.

### Brand knowledge

Almost all French and German consumers are aware of the island of Ireland, but their knowledge of it as a holiday destination is relatively minimal. Given the available resources and the growth targets that have been set, we cannot seek to generate broad-scale,

deep brand knowledge among German and French consumers. Instead, we will focus our efforts and resources on developing relevant brand knowledge in high-potential segments.

### Brand relevance

Our research has found that the island of Ireland holiday experience is highly relevant and motivating for the high-potential target consumer segments. We will focus on increasing this level of relevance and, in doing so, drive visitor numbers.

### Brand differentiation

The island of Ireland is not seen as unique. French and German consumers tend to go to a broad range of destinations on their holidays. With this in mind, determining the island of Ireland's competitive set is challenging. For comparative purposes, the island's immediate competitive set has been defined as Scotland, England, Wales and the Nordic countries.

Although the island of Ireland offers a compelling proposition in terms of natural environment and landscape, so do key competitive destinations. Our research found that few destinations achieved significant relevant brand differentiation. We must develop an offering that stands out from our immediate competitors in the coming years.

# product and experience



Connemara, Co. Galway



## Current offering

Based on our research in the French and German markets, we know the island of Ireland has a significant inventory of products and experiences that appeal to the target consumer segments. In summary:

- The satisfaction levels of French and German visitors are high
- There are no obvious product gaps or areas of concern, and the island's natural assets match many consumer motivations
- Improvements in value-for-money ratings in both France and Germany have made the island of Ireland more attractive. It now needs to remain competitive.

The island of Ireland is not sufficiently distinctive from its competitors when it comes to product and experience. Our focus will be on refining and sharpening Ireland's experience offering, ensuring it is differentiated and tailored towards the interests and needs of priority segments.

## Developing experiences to stand out from competitors

The current tourism asset base has three elements where the island of Ireland competes well – natural heritage, built heritage and cultural heritage. We have found, however, that these are not enough to enable the island of Ireland to stand out in the congested zone it shares with competitors.

We cannot expect to stand out by continuing to present our asset base as we have in the past. We need to improve the services we offer. We also need to consider how bundling motivating experiences that currently exist could help us to stand out further.

The island of Ireland needs to address the way we present products and experiences to visitors and the way visitors happen upon them. Consumer insight will be key to guiding how we do this.

Both Fáilte Ireland and the Northern Ireland Tourist Board are taking specific actions to address these goals, as outlined in Appendices 3a and 3b.

## Fostering industry and trade engagement

Our success in Germany and France will depend on the degree to which we pull together and work as a united force. All stakeholders must act with target segments in mind and, in doing so, connect our efforts in communications, experience development, and delivery and sales.

To support industry on the island of Ireland, the Northern Ireland Tourist Board (NITB), Fáilte Ireland and Tourism Ireland will take the specific actions listed in Appendix 4.

# distribution and access



Cliffs of Moher, Co. Clare



## Distribution

The island of Ireland is well served in both online and offline channels in France and Germany. To maintain this strong position, we will continue to constantly monitor and develop the broader tour operator and niche distribution base. New opportunities will emerge over time and the sector will respond to these to maximise growth. The sector must continue to create its own opportunities. Active face-to-face ('shoe leather') selling will continue to be a key driver in business generation.

Programming of Northern Ireland has improved in France and Germany, but further development is required and there are plans in place to achieve this.

Island of Ireland presence on online travel agency sites (OTAs) is good. The OTA channel is set to expand further and we will embrace it as an opportunity to present the island of Ireland in more 'shop windows'.

## Access

There has been a significant reduction in air capacity from France and Germany since 2008 because of reduced outbound and inbound demand and the rationalisation of routes and airlines. In spite of this, access remains relatively strong and capacity is beginning to grow again, particularly from Germany.

The forthcoming removal of the airport tax in the Republic of Ireland will only serve to support further access

development. Dublin remains the dominant hub for holidaymakers from France and Germany. It must be used as a gateway to the entire island of Ireland.

Work is ongoing to identify new route development opportunities and capacity and seasonal requirements. Some initial access wins have been announced for 2014:

- Bordeaux – Belfast (Easyjet)
- Munich – Shannon (Ryanair)
- Paris – Shannon (Ryanair)
- Hanover – Dublin (Aer Lingus)
- Berlin – Shannon (Ryanair)
- Cologne – Ireland West Airport Knock / IWAK (Germanwings)
- Cherbourg – Dublin (Irish Ferries)

See Appendix 5 for more information on the specific actions Tourism Ireland is undertaking as priority.



Oysters, Carlingford, Co. Louth

# measuring success



Causeway Coast, Co. Antrim





## Delivering growth

Implementing the full strategy and action plan identified in the Germany and France assessment will drive accelerated growth from Germany and France to the island of Ireland. This should deliver 746,000 promotable visitors and €440/£378 million in promotable revenue in 2016.

## Key performance indicators

We have put in place a specific set of key performance indicators and a measurement framework to focus resources and drive towards achieving targets. These are:

- **Revenue** – the promotable spend by French and German holidaymakers on the island of Ireland
- **Visitors** – the number of promotable holidaymakers that visit the island of Ireland
- **Market share** – the percentage share of overseas travel from the French and German markets (measured in the context of our defined competitive set)
- **Channels** – the number and percentage of key trade partners adopting the segmentation model and experience types
- **Experience development** – the percentage of German and French holidaymakers who would “definitely” recommend a holiday on the island of Ireland
- **Value for money** – the percentage of French and German holidaymakers ranking the island of Ireland as “good” or “very good” value for money



Gravity Bar, Guinness Storehouse, Dublin

## Measurement

We will track overall performance and segment performance. Tourism Ireland will monitor the island of Ireland's segment performance through its Brand Tracker survey. In the Republic of Ireland, Fáilte Ireland will conduct exit interviews with departing French and German holidaymakers. The Northern Ireland Tourist Board, with the Northern Ireland Statistics and Research Agency (NISRA), will seek to do the same. Across the island of Ireland, carriers and attractions will gather real-time data to help monitor and measure tourist numbers. In addition, and in line with our commitment to grow promotable revenue in particular, we will work with both the CSO and NISRA to report achievement against the revenue targets. We will also measure success in

an international context in terms of share of visitor spend versus key competitor destinations.

## Collaborating to succeed

The tourism agencies and the industry have jointly developed a clear strategy to drive accelerated growth and build market share in the German and French markets. This collaboration has produced a powerful roadmap that, if followed, will lead to sustained development in two of the island of Ireland's key markets. The tourism industry must play their role in developing experiences designed to motivate our target segments.



Viking Tour, Dublin

## Appendix 1: Consumer segmentation in the French and German markets

### Understanding the segments

The following three pages give a snapshot of the three target consumer segments. They answer the following questions for each segment:

- **Who are they and what motivates them?** (Broad demographics and key motivations)
- **What do they want from a holiday?** (Core needs and desired outcomes from a holiday)
- **What do they not want?** (What target consumers want to avoid)
- **What are they most likely to do while here?** (Activities and experiences likely to motivate segments)
- **What is their holiday behaviour?** (Likely accommodation choice, duration of holiday and so on)
- **What are the local nuances?** (How local profile differs from global profile for the same segment)

The primary targets are the Culturally Curious and the Great Escapers. We have also identified a third important segment – Social Energisers – which matters because of its size and ‘warmth’ (a strong propensity to visit) towards the island of Ireland. Social Energisers are also important because, in targeting them, the tourism sector can address two key strategic objectives:

1. Grow visitor numbers through a well-defined and compelling city break proposition
2. Increase the relevance of the island of Ireland as a year-round destination by targeting this group for off-peak and low season travel

By including the Social Energisers as a target, the island of Ireland broadens the scope of consumers it can attract.

## Culturally Curious

### Who are they?

- Tend to be middle aged (35-54)
- Likely to travel as a couple or with other adult friends
- Want to broaden their minds and expand their experiences through landscape, history and culture
- Curious and keen to learn about the places they travel to
- Independent 'active' sightseers
- Want to encounter new places and out-of-the-ordinary experiences

### What do they want from a holiday?

- Authenticity is key
- Don't want to be part of the herd
- Exploration and discovery is important to them
- Want to gain insight into a place and get underneath its skin
- Enjoy connecting with nature and getting off the beaten track
- Like to connect with people
- Enjoy learning and find culture in cities interesting

### What do they not want?

- Not on holiday to party and will avoid this
- Don't want to feel they are doing the cliché 'tourist' thing
- Don't want to interact with other holidaymakers

### What are they most likely to be seen doing?

- Exploring small towns and villages, experiencing history and culture simultaneously
- Talking to locals to get a different take on the story of a place

### What is their holiday behaviour?

- The Culturally Curious choose accommodation so that they can see and do as much as possible, as well as get a local flavour. They stay in mid-range 4-star hotels, self-catering and B&Bs.

### What are the local nuances for France?

- Like to discover the unknown
- Less motivated by socialising and contact with locals
- More motivated by breath-taking beauty and landscape

### What are the local nuances for Germany?

- Value peace and quiet and a different pace of life
- Have a strong coastal focus
- Slightly more active (enjoy outdoor activities)

## Great Escapers

### Who are they?

- Tend to be younger (25-45), with 40 per cent under 35
- Are often couples, some with young children, or travelling with friends and older family members
- Need time out from busy lives and careers
- Specifically interested in rural holidays

### What do they want from a holiday?

- Top of their agenda is to enjoy the beauty of a breath-taking landscape
- More motivated by the beauty of the landscape than its history (but they do like to have some sense of a place's culture and history)
- Want to balance peace and quiet with doing some activities
- Want to come home refreshed and revitalised, with their batteries recharged

### What do they not want?

- Don't want to make connections with locals or other tourists while on holidays. That is not a main motivation or essential part of their trip.

### What are they most likely to be seen doing?

- Enjoying the beauty of breath-taking landscapes
- Visiting the coastline (this idea really motivates them)
- Exploring the landscape through walking
- Travelling through small towns on the Atlantic coast

### What is their holiday behaviour?

- Great Escapers stay in hotels, B&Bs and self-catering accommodation. Access to beautiful scenery is the most important thing for them. They are more likely to pay for services that are unobtrusive and give them uninterrupted time to themselves.

### What are the local nuances for France?

- Less active than average when outdoors
- Slightly more interested in culture
- Less exploration-focussed
- Desire good food and wine

### What are the local nuances for Germany?

- Even greater focus on nature and rural settings
- Less interested in gourmet food

## Social Energisers

### Who are they?

- The youngest target segment, with about 42 per cent under 35
- Like to holiday in groups or as couples
- Look for places that are new, different and vibrant

### What do they want from a holiday?

- Fun and enjoyment with friends
- New experiences and exploring new places
- Something unique and different
- Exciting and iconic activities
- The urban experience as well as enjoying the adjacent landscape
- Lots to do in a small area – they want to pack everything in

### What do they NOT want?

- Peace and quiet is off the agenda

### What are they most likely to be seen doing?

- Taking in iconic (but accessible) scenery
- Soaking up the atmosphere in a traditional pub
- Visiting attractions where fun or adventure is part of the deal – not just passive viewing

### What is their holiday behaviour?

- Social Energisers like to stay in hotels close to the action. They want to be located where there is lots going on around them.

### What are the local nuances for France?

- More into partying as part of their holiday
- Motivated by beauty and nature
- Less inclined to engage in physical activities

### What are the local nuances for Germany?

- Like slightly more active experiences rather than partying
- Enjoy outdoor activities, such as cycling – an active way to enjoy scenery and landscape
- Need to feel a sense of 'freedom'

## Appendix 2a: Current brand strength

Every year, Tourism Ireland's Brand Tracker measures the relevance and appeal of the island of Ireland as a holiday destination. It specifically measures:

- **Interest** – The percentage of people who say they would be 'interested' in taking a holiday or short break on the island of Ireland at some time in the future
- **Intent** – The percentage of consumers who say they 'intend' on taking a holiday or short break here in the next three years
- **Active planning** – The percentage of consumers who say they are 'actively planning' a holiday or short break on the island in the next twelve months

According to the 2013 Brand Tracker, the island of Ireland brand scores well on the key dimension of 'interest'. Like many other destinations, however, it faces the challenge of translating 'interest' in to 'active planning' and ultimately visiting.

Strengthening this brand metric is paramount. The island of Ireland has shown it can significantly improve scores relating to 'active planning', which increased from 10 per cent in 2011 to 15 per cent in 2013 in the German market.

Figure 6 opposite gives an overview of brand tracker trends, showing where the island of Ireland ranks relative to alternative international destinations.

Figure 6: Brand Tracker ranking

FRANCE	2011	2012	2013
Interest	4th	3rd	3rd
Intent	3rd	3rd	3rd
Active planning	5th	5th	4th

GERMANY	2011	2012	2013
Interest	8th	9th	8th
Intent	9th	8th	6th
Active planning	10th	9th	9th

Source: Millward Brown Brand Tracker 2013 (Sample: 1,000 respondents per market aged 18+ years, ABC1s, outbound holidaymakers)

Much of our future emphasis in both the French and German markets will be on translating high levels of brand affinity (interest and intent) into actual bookings. The new segmentation strategy (outlined in the previous section) will be key in addressing this.

By focussing on consumers who are more likely than average to visit the island of Ireland, the sector will be much better positioned to:

- Actively influence them to choose it as their holiday destination
- Facilitate purchase
- Deliver an outstanding experience

## Appendix 2b: Driving brand relevance and differentiation

We will use the island of Ireland’s brand architecture framework to address the challenges and opportunities previously outlined above (see Appendix 2a). This framework provides a basis for developing and communicating the experiences deemed most relevant to priority segments. It brings focus to all our activities, helping to:

- Direct current communications
- Guide the configuration of holiday itineraries in the medium term

- Support decisions on long-term product and experience development

Under the umbrella of the destinations master brand, and led by consumer research findings, we have grouped the island of Ireland’s tourism assets around experiences, rather than by geography, holiday needs or holiday type. Figure 7 below gives an overview of the brand architecture.

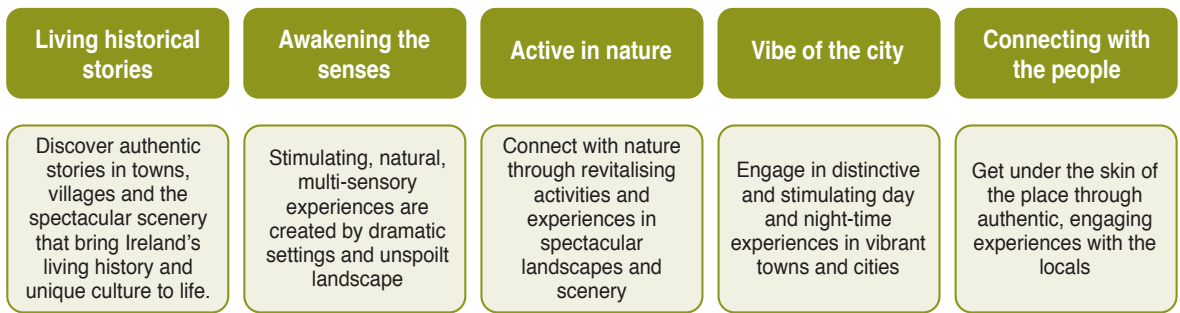
**Figure 7: The island of Ireland brand architecture framework**

<b>Brand promise:</b>	The island of Ireland is full of authentic immersive experiences
<b>Brand essence:</b>	Immersion
<b>Benefit:</b>	Joy
<b>Tone of voice:</b>	Lively, upbeat, informal, witty, not taking ourselves too seriously

**Reasons to believe:**

- **Our character:** rich diversity of surprising, spontaneous and ‘only in Ireland’ experiences, which are authentic not staged, both historical and contemporary
- **Our characters:** Ireland’s engaging people, freely giving insights into our culture, delivered in a fun, engaging, human, conversational way.

### Experience pillars that deliver the brand promise





## Appendix 2c: Linking segmentation to brand architecture

Our research has identified the different types of experiences that really motivate the priority consumer segments in France and Germany, and which the island of Ireland can present in a credible and engaging way. The experience themes and their relevance to the different segments are outlined below, with a range of typical examples given for each.

### Living historical stories

Discover authentic stories in towns, villages and the spectacular scenery that bring the island of Ireland's living history and unique culture to life. These include:

- Visiting World Heritage sites such as the Causeway Coast
- Exploring the Glengowla Mines in Connemara
- Visiting the ancient site of An Grianan of Aileach on the Wild Atlantic Way
- Enjoying traditional pubs
- Taking a tour of the Bushmills Distillery

**Relevant to:** Culturally Curious in both France and Germany

### Active in nature

Connect with nature through revitalising activities and experiences in spectacular landscapes and scenery, including:

- Enjoying beach and forest walks in Ballycastle on the Causeway Coast
- Roaming through Killarney National Park
- Taking in the beauty of Skellig Michael

**Relevant to:** Culturally Curious in Germany and Great Escapers in France

### Awakening the senses

Be amazed by stimulating, natural, multi-sensory experiences in dramatic settings and unspoilt landscape. These include:

- Taking in the natural beauty and isolation of Inishbofin Island
- Enjoying the Food Crawl in Kilkenny
- Exploring the Glens of Antrim

**Relevant to:** Great Escapers in both France and Germany

### Vibe of the city

**(Tailored for the French and German markets)**

See vibrant cities (Dublin, Belfast, Cork, Galway) with surprising experiences, where city living thrives side by side with the natural outdoors. Relevant experiences include:

- Cycling through the beautiful landscape followed by enjoying music in a Dublin pub
- Enjoying the Belfast music scene following a river cruise in the Titanic quarter

**Relevant to:** Social Energisers in both France and Germany

Along with all these themes, the promise of experiencing authenticity at every turn is integral to success in the French and German markets. In addition, it is worth remembering that both French and German consumers in the primary segments see the island of Ireland's coastline as a compelling and distinct motivator. We should use it appropriately as a key brand asset.

## Appendix 2d: Implications – translating strategy and insights into action

The work on the German and French markets has provided very clear strategic direction and clarity around consumer targets and these must inform the brand and all communications by agencies and

industry partners if we are to maximise growth from both markets.

Figures 8, 9, 10 and 11 set out the key strategic imperatives and actions that Tourism Ireland will implement in the next year and beyond.

**Figure 8: France – key strategies**

<p><b>Focus resources</b> in France by targeting our best-prospect and priority segments, which are, in order of importance:</p> <ul style="list-style-type: none"> <li>● Culturally Curious</li> <li>● Great Escapers</li> <li>● Social Energisers</li> </ul>
<p><b>Prioritise iconic experiences</b> that resonate most strongly with priority segments. Focus brand communication on fewer, unique and compelling icons. We must mention the UNESCO stamp of approval whenever possible.</p>
<p><b>Bring the Wild Atlantic Way to life</b> through brand-led and more tactical activities. Use it to:</p> <ul style="list-style-type: none"> <li>● Get French visitors to the island of Ireland to stay longer</li> <li>● Encourage them to visit different parts of the island along with must-see Connemara</li> <li>● Encourage them to visit again or repeatedly by recommending they do the entire coastline in stages and continue onto the Causeway Coast</li> </ul>
<p><b>Showcase Northern Ireland</b> as a must-see destination with unique attributes within the overall island of Ireland experience.</p>
<p><b>Focus on Titanic Belfast, the Causeway Coastal route</b> and unique historical heritage as drivers of growth for Northern Ireland.</p>
<p>Use <b>key account management (KAM)</b> to:</p> <ul style="list-style-type: none"> <li>● Identify partners with the greatest potential to convert interest into bookings</li> <li>● Work with industry on the ground to create segment-focused itineraries and expand programming along the Wild Atlantic Way (WAW)</li> </ul>
<p>Use KAM to identify partners that can extend programmes to include <b>more overnights in Northern Ireland</b> and include experiences relevant to target segments.</p>

Figure 9: France – key actions

Actions	Culturally Curious	Great Escapers	Social Energisers
<p><b>Use global brand architecture to:</b></p> <ul style="list-style-type: none"> <li>■ Underline the distinctive authenticity of our destination</li> <li>■ Prioritise the pillars most relevant to our priority segments</li> </ul>	Living historical stories with a backdrop of stunning scenery	Awakening the senses	Vibe of the city
<p><b>Define the most appropriate media mix for brand advertising (offline and online) for each of the target segments, building on our experience in Great Britain and the United States</b></p>	TV Web	TV  Web	Web  Social media and blogs
<p><b>Use segment-appropriate themes and experiences for publicity and media visits – target print, online and TV publications with strong appeal for each key segment</b></p>	<p>WAW Causeway Coastal Route</p> <ul style="list-style-type: none"> <li>■ DubLine</li> <li>■ East Coast heritage trails</li> <li>■ Derry/ L'derry</li> <li>■ Food experiences</li> <li>■ Pub and trad music</li> <li>■ Castles and gardens</li> <li>■ Colourful towns and villages</li> <li>■ Titanic</li> <li>■ Celtic heritage</li> <li>■ B&amp;B experience</li> </ul>	<p>WAW Causeway Coastal Route</p> <ul style="list-style-type: none"> <li>■ Soft adventure (walking and cycling trails)</li> <li>■ Cottage rental</li> <li>■ Family friendly sites</li> <li>■ Castles and gardens</li> <li>■ Colourful towns and villages</li> <li>■ Celtic heritage</li> <li>■ Authentic experiences</li> <li>■ B&amp;B experience</li> </ul>	<p>Dublin Plus (with sea and mountains)</p> <ul style="list-style-type: none"> <li>■ New/cool Dublin</li> <li>■ Pub atmosphere</li> <li>■ Traditional and contemporary music</li> <li>■ Belfast city breaks</li> <li>■ Unique experiences</li> </ul>
<p><b>Co-op campaigns with major access partners, online travel agencies (OTAs) and tour operators</b></p>	<b>Spring</b>	<b>Spring</b>	<b>Autumn and winter</b> to drive business during shoulder season

**Figure 10: Germany – key strategies**

<p><b>Focus resources</b> in Germany by targeting our best-prospect and priority segments, which are, in order of importance:</p> <ul style="list-style-type: none"> <li>● Culturally Curious</li> <li>● Great Escapers</li> <li>● Social Energisers</li> </ul>
<p><b>Filter all campaigns and communications</b> through the lens of our key segments and motivating experiences that most resonate with them.</p>
<p><b>Living historical stories</b> and <b>Active in nature</b> will underpin all brand messaging and provide motivations to travel. Awaken the senses will deliver the tone of voice and atmosphere.</p>
<p>Make the most of offline and online assets to make the island of Ireland a <b>distinctive, compelling and authentic</b> destination for our segments.</p>
<p><b>Strengthen knowledge of key iconic sites</b> that resonate most strongly with priority segments to deliver competitive standout. We must mention the UNESCO stamp of approval whenever possible. The Wild Atlantic Way and The Causeway Coastal Route will be the core anchors as they deliver best on key holiday motivations and experiences of the top segments.</p>
<p><b>Showcase Northern Ireland as a must-see and must-include destination</b>, highlighting signature icons and experiences that appeal most to the motivations of our core segments (for example, the Causeway Coastal Route).</p>
<p>Use <b>key account management (KAM)</b> tools to identify key partners in the market. Support the creation of segment-focused itineraries and marketing. Liaise with industry on the ground to provide appropriate programmes.</p>
<p>Use KAM to identify partners who can extend programmes to include greater overnights in Northern Ireland and include experiences relevant to new segmentation approach.</p>

Figure 11: Germany – key actions

Actions	Culturally Curious	Great Escapers	Social Energisers
<p><b>Use key market experience themes to underpin all brand messaging and motivate travel to the island</b></p>	<p>Use segmentation below to deliver tone of voice:</p> <ul style="list-style-type: none"> <li>■ Living historical stories</li> <li>■ Active in nature</li> <li>■ Awakening the senses</li> </ul>	<p>Use segmentation below to deliver tone of voice:</p> <ul style="list-style-type: none"> <li>■ Living historical stories</li> <li>■ Active in nature</li> <li>■ Awakening the senses</li> </ul>	<ul style="list-style-type: none"> <li>■ Active in nature</li> <li>■ Way of life on the island/connecting with the people/ meet the locals</li> </ul>
<p><b>Showcase unique and motivating experiences throughout all communications</b></p> <p><b>Publicity/media visits and content marketing will also focus on these</b></p>	<p><b>Raw nature:</b> Pure, authentic and wild landscape (for example, WAW, Causeway Coastal Route)</p> <p><b>Towns and village life:</b> Discovering picturesque, cosy but lively towns and villages with flair (for example, Derry~Londonderry, Kilkenny, Limerick City of Culture)</p> <p><b>History and culture:</b> Unique to the island of Ireland (for example, Dublin, Belfast, castles, monasteries, forts)</p> <p><b>The 'craic':</b> Typically lively atmosphere, culture and conviviality (for example, food markets and local pubs)</p>	<p><b>Raw nature:</b> Pure, authentic and wild landscape (for example, WAW, Causeway Coastal Route)</p> <p><b>History and culture:</b> Unique to the island of Ireland (for example, Dublin, Belfast, castles, monasteries, forts)</p> <p><b>The 'craic':</b> Typically lively atmosphere, culture and conviviality (for example, food markets)</p>	<p><b>Raw nature:</b> Pure, authentic and wild landscape (for example, WAW, Causeway Coastal Route)</p> <p><b>The 'craic':</b> Typically lively atmosphere, culture and conviviality</p> <p><b>Adventure in nature:</b> For example, canoeing or kayaking, Marble Arch caves</p>

Figure 11: Germany – key actions (continued)

Actions	Culturally Curious	Great Escapers	Social Energisers
<p>Select the most valuable media mix for advertising (offline and online), for each of the target segments</p>	<p><b>Spring</b></p> <p><b>Awareness driver:</b> TV advertising and online</p> <p><b>Engagement driver:</b> Online</p> <p><b>Planning and booking:</b> Online and co-operative advertising</p> <p>Newspapers, magazines and radio: relevant for co-operative advertising/PR</p>	<p><b>Spring</b></p> <p><b>Awareness driver:</b> TV advertising and online</p> <p><b>Engagement driver:</b> Online</p> <p><b>Planning and booking:</b> Online and co-operative advertising</p> <p>Newspapers, magazines and radio: relevant for co-operative advertising/PR</p>	<p><b>Spring/Autumn</b></p> <p><b>Awareness driver:</b> TV advertising (spill-over effect from TV aimed at Culturally Curious and Great Escapers)</p> <p><b>Engagement driver:</b> Social media Online</p> <p><b>Planning and booking:</b> Online and co-operative advertising</p>
<p>Search engine marketing and content dissemination year round</p>			
<p>Co-operative campaigns with major access partners, OTAs and tour operators, targeting key segments with specific messaging</p>	<p><b>Spring</b> Summer travel</p> <p><b>Autumn</b> Off-season short breaks and stimulus for next year's travel</p>	<p><b>Spring</b> Summer travel</p> <p><b>Autumn</b> Off-season short breaks and stimulus for next year's travel</p>	<p><b>Spring/Autumn</b> OTA focus – city breaks</p>

## Appendix 3: The experience development strategy

This strategy needs to:

- Deliver strong motivation-based experiences
- Ensure solid on-the-ground training so suppliers are in tune with consumers' needs and desires
- Make sure destinations excel at one or two things – the 'hero' experiences needed 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
- Continue to innovate in how consumer experiences are delivered and presented
- Ensure all product suppliers buy into the delivery of excellent motivation-based experiences in a professional and friendly way
- Pay attention to the nuances that exist between markets in terms of delivery (language, knowledge, relevance and so on)

### 3a: Specific actions in product and experience development (To be taken by Fáilte Ireland)

We have identified a number of key actions to fully define the experience development agenda. The global segmentation model informs the experience development strategy set out

below. The strategy also pays specific attention to different nuances that have been identified in the French and German markets.

### Key actions to build experiences

Short- and longer-term development priorities across the Wild Atlantic Way (WAW), Dublin, and South and East Heritage programmes will be identified. These priorities will be aligned with the key consumer segments in France and Germany. They will focus on:

- Natural heritage – unique, rugged, unspoilt landscapes unlocked for consumers, with greater emphasis given to positioning Ireland as an island with a dramatic coastline
- Built heritage – with emphasis on World Heritage sites and ancient monuments, such as megalithic tombs and forts
- Traditional culture and folklore – language, music, dance, song, myths and legends
- Living culture – arts, festivals, crafts, food, and daily life in town and villages

### Key short-term (2014) initiatives

Fáilte Ireland will activate the initiatives listed below on the WAW, Dublin, and South and East Heritage programmes:

- **Investment projects**
  - WAW route signposting
  - WAW 'Top 15' discovery point development
  - DubLine route
  - Kilkenny Medieval Mile
  - Cork city and harbour works.

- **Interpretation projects** – a wide variety of projects will be triggered across all three programmes (while protecting the sense of authentic experiences)
  - Create the ‘organising concept’ for South and East Heritage
  - Interpret and animate key heritage stories in the programmes
- **Rollout of relevant Great Escaper experiences on the WAW** – for example the 17km scenic walk along and up towards the Cliffs of Moher
- **Service enhancement** – a bespoke service-enhancement programme in key tourism hotspots will be delivered to ensure the service needs of German and French visitors are understood and fulfilled

- **Community mobilisation** – a series of community engagement and activation programmes will be delivered to create a sense of place/pride in place that underpins the quality of the welcome in key tourism hotspots

#### Other key actions

- Carrying out concept pre-testing of additional and enhanced experiences that will be market-ready in 2014 (and repeating again later in 2014 for experiences to be launched in 2015), paying attention to both the German and French markets
- Giving further consideration to the supply-side challenge, while:
  - Drawing on appropriate national and international benchmarks



Killybegs Harbour, Connemara, Co. Galway



- Seeking to identify prevailing international good practice in this area
- Undertaking relevant analysis and insight gathering to enhance the segmentation findings emerging from the review
- Identifying and benchmarking best-practice experience delivery around the world, determining what and where are the most relevant 'best-practice' providers that the island of Ireland can learn from
- Undertaking a competitive benchmarking exercise assessing the island of Ireland's competitors in the German and French markets to provide guidance on how we can be better or stand out more – we will experience leading competitor offers, such as Norway's fjords, to gather learning and insight that can guide and improve the island of Ireland's natural environment experience
- Developing an 'experience development framework' to ensure cohesive action from "Ireland Inc" – we need the right experiences, delivered in the right way and sold in a way that makes them easily accessible
- Developing a 'new experiences pipeline' to ensure a flow of 'new news' for French and German buyers and consumers every year
- Developing a 'commercialisation framework' for authentic experiences that makes it easy for domestic trade to trade internationally and ensure "Ireland Inc" is 'easy to do business with' from an overseas buyer's perspective. This will involve:



Connemara National Park, Connemara, Co. Galway

- Creating domestic experience activation and sales activation trade groups
- Developing targeted channel management strategies for key programmes and their constituent experiences
- Delivering an international selling capability building programme to domestic trade
- Providing domestic trade with 'best fit' sales platforms and opportunities
- Developing and implementing a process to evaluate and continuously improve experience development

## Appendix 3b: Specific actions in product and experience development To be taken by Northern Ireland Tourist Board (NITB)

The strategic review for Germany and France has reaffirmed that Northern Ireland has the assets to attract visitors from these markets. Target segments' motivations are closely aligned with product and experience development plans for Northern Ireland and the Coast and Lakes and the unique outdoors experience pillars.

The key proposition is Northern Ireland's coast and natural and built heritage. The focus of NITB's product and experience development will be to make our coast and landscape accessible in a way that resonates with the needs and motivations of our French and German visitors.

### Key actions to build experiences

To drive exceptional experience development in Northern Ireland, NITB will:

- Disseminate findings
- Working with industry to identify and develop the key demand generators for these markets and provide a structure for them to develop appropriate experiences. (This will be facilitated through our pillar engagement programme)
- Ensure these experiences are represented in all communications

channels and are the focus of media and trade familiarisation visits, and trade representation in market

- Deliver excellent customer service based on a thorough understanding of French and German visitor needs and aspirations, including language and food

### Other key actions

As a priority, NITB will:

- Identify the key demand generators for the Culturally Curious and Great Escapers segments, as an immediate priority
- Focus on developing experiences along the coastal routes that appeal to these segments
- Use the Giant's Causeway (Northern Ireland's only UNESCO World Heritage site and a world-class visitor attraction) as the hook for the area, encouraging visitors to explore the rest of the Causeway Coastal Route and potentially link up with the Mourne Coastal Route.
- Support the appeal of the Coast by building opportunities to experience local culture and explore the area further
- Promote the revival of the Victorian Gobbins Path on the Causeway Coastal Route – it was once one of the most popular attractions on the island of Ireland and offers visitors the thrill of walking a cliff path
- Develop a plan and deliver an industry engagement programme that enables industry to meet the



Belfast City of Music Festival, Co. Antrim

needs of the target segments (helping NI increase its market share)

- Support activity operators, who are already creatively diversifying their product to deliver experiences that appeal to both the Culturally Curious and Great Escapers, such as dive school operators using their high speed boat to offer sea safaris, themed canoe trails with an informative guide and night bike rides through forest parks.
- Market walks as an opportunity to experience unique views and wildlife

or linked to an historical event or myths and legends.

- Realise the potential of Derry~Londonderry to be both an effective gateway for visitors from France and Germany, given its long rich history and vibrant cultural scene, and a natural link between the Causeway Coastal Route and Wild Atlantic Way.
- Make the pub experience accessible, especially for non-English speaking visitors

## Appendix 4: Fostering industry and trade engagement

### Fáilte Ireland (FI): Sharing insights

#### 1. Germany and France toolkits

**(online/offline):** These will be developed and circulated. They will summarise detailed research in user-friendly language, drawing out the key insights and their implications.

#### 2. Germany and France 'Market-readiness assessment' tool:

FI will put in place this self-assessment tool to help domestic firms assess if they are ready to sell into the German and French markets (either directly or through channel intermediaries).

#### 3. Webinar (recorded interviews):

FI will record interviews that summarise key findings of available research. These will feature tour operators, online travel agencies (OTAs) and digital experts to explain and emphasise key considerations and insights for the industry on the island of Ireland.

#### 4. Web internationalisation awareness workshop:

FI will highlight how the island of Ireland needs to excel online if we are to appeal to German and French consumers and be helpful to channel intermediaries selling on our behalf.

#### 5. Industry/stakeholder briefings:

a) **Workshops:** FI will hold regional workshops with providers from the accommodation, food,

activity, attractions and events sectors. FI will brief attendees on the segmentation and trade research findings. Then, FI will facilitate creative workshops to tease out our research findings and use them constructively, either in designing potential new visitor experiences or improving existing ones so they become more accessible to French and German visitors.

b) **One2One briefings:** FI will individually brief major key account and strategic partners such as Incoming Tour Operators Association (ITOA) members and OTAs, and work to shape an itinerary development agenda for 2014 to 2016.

### Using insights

1. **Key account management:** FI will identify, manage and agree development plans with businesses that are core to developing or selling authentic experiences that are likely to really motivate both German and French consumers.

2. **Experience development capability building:** FI will design and deliver an experience development capability-building programme to foster a culture and competence in consumer-led innovation among tourism businesses.

3. **Experience development clusters:** FI will mobilise cross-sector clusters of domestic industry practitioners to

create new visitor experiences. These can be market-tested and subsequently commercialised if they are found to appeal to German and French consumers and key channel intermediaries.

**4. Sales development ambassadors:** FI will identify a range of businesses that have the commercial acumen, sales skills and market knowledge to effectively sell key experiences into Germany and France. FI will also give appropriate support to these businesses.

**5. Sales capability-building programme:** FI will design and deliver a broad overseas selling competencies programme to facilitate sustainable sales growth in the 2014-2016 period.

### Northern Ireland Tourist Board

Building on recent successes in terms of industry engagement in respect of the GB market, NITB is committed to developing and delivering an industry engagement programme which will support the Northern Ireland industry to better understand and meet the specific requirements, needs and opportunities of the key segments in France and Germany. This will assist in our objective to deliver an increased market share for NI.

### Tourism Ireland: Engaging overseas trade

Tourism Ireland (TI) has identified a range of key actions to support and influence trade partners in France and Germany. We will work to influence how trade partners develop and

communicate itineraries and offers. We will also take the key actions listed below.

1. TI will ensure that overseas trade has a deep understanding of the island of Ireland's segmentation strategy and that it is motivated to use the strategy in marketing programmes and sales efforts. TI will support this effort by putting in place toolkits (imagery, content and so on) that will enable trade partners to do this and by implementing joint marketing plans.
2. Working with ITOA members, TI will seek to ensure a cohesive approach on product availability. Focussing on the segmentation strategy, TI will work with overseas trade partners to build itineraries aligned with those being developed by their counterparts on the island of Ireland.
3. As new experiences come on stream, TI will make sure trade partners are aware of these new developments by building them into familiarisation trips and so on.
4. TI will engage with OTAs to see how programmes can be promoted through their channel. When OTAs are already programming the island of Ireland as a destination, TI will encourage them to expand their product offering and promote it more widely (potentially through joint promotions).

TI will develop a way for trade to offer views on current experiences and those under development (to ensure concepts will appeal to German and French consumers).

## Appendix 5: Improving distribution and access

### Distribution

Tourism Ireland has identified the following actions as key to improving distribution:

- Aligning distribution and segmentation strategy – we will prioritise promotional opportunities for those tourism industry partners in France and Germany whose offerings best match the needs of priority segments
- Providing new promotional platforms for island of Ireland tourism partners to facilitate access to key segments so they can more effectively close the sale
- Ensuring Ireland.com information and offers are focussed on the target consumer segments
- Together with Fáilte Ireland and the Northern Ireland Tourist Board, seeking to enhance the digital capability of the industry and trade
- Working with market operators and their DMCs to increase Northern Ireland programming and promoting these programmes through co-operative campaigns

### Access

To continue to maintain and develop access to the island of Ireland, Tourism Ireland has identified and agreed the following priority actions:

- To continue to concentrate cooperative marketing resources on those strategically important air and

sea routes that deliver the greatest promotable visitor revenue from Germany and France.

- To proactively engage with airports and investors to make the case for new, strategically important routes, which would increase promotable revenue and deliver direct access to the island. Focus will be on:
  - Increased seasonal capacity on existing routes: Frankfurt, Munich, Cologne, Paris, Toulouse, Lyon
  - New routes, including Dusseldorf–Belfast, North Rhine-Westphalia/Lyon–Shannon/Ireland West Airport Knock (IWAK)/Belfast, some of which may be seasonal
- To pursue increased visitor revenue in the shoulder and off season by aligning marketing activities with carrier promotional programmes and by using co-operative campaigns to extend the season



Giant's Causeway, Co. Antrim

## Acknowledgements

**We wish to acknowledge the contributions of the following organisations to the Steering Group for these assessments:**

Aer Lingus  
Fáilte Ireland  
Incoming Tour Operators Association (ITOA)  
Irish Tourist Industry Confederation (ITIC)  
Marketing Partnership Group (MPG) France  
Marketing Partnership Group (MPG) Germany  
Members of the Northern Ireland tourism Industry  
Northern Ireland Tourist Board  
Titanic Belfast  
Tourism Ireland

**Many members of the tourism industry on the island of Ireland and our trade partners in France and Germany gave generously of their time and expertise throughout the course of the reappraisal. These included:** Aer Lingus, Ryanair, Irish Ferries, Brittany Ferries, Guinness Storehouse, IHF, NIHF, B+B Ireland, our Marketing Partnership Groups (MPGs) in France and Germany amongst others.

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