



Action Programme for
GB Tourism Growth

GROW

DIFFERENCE

GROW VALUE

We face a serious challenge to return our tourist numbers from GB to strong growth but together we will succeed.



A decline in GB consumer confidence has led to a 14.6% drop in GB outbound visitors to Western Europe so far this year. The corresponding drop in GB visitors to the island of Ireland has been 16.2% with holidaymakers showing an even sharper decline.

We need immediate action to arrest this decline and to return our most important tourism market to growth.

This publication is the result of a recent review of the GB leisure and business tourism market and the challenges and opportunities that face the island of Ireland. The principles underpinning this review have been close industry involvement, broad consultation on potential solutions and strong activation across the board including Northern Ireland for each priority action.

There are two main phases to the Action Programme for GB Tourism Growth:

1. 2010 Turnaround Plan:

This sets out 10 major initiatives that are focused on achieving stabilisation and then recovery.

2. 2010-13 Growth Priorities:

This describes the five growth priorities we will pursue to sustain the momentum of the 2010 Turnaround Plan through to 2013.

We face a serious challenge to return our tourism from GB to strong growth but together we will succeed.

A handwritten signature in cursive script that reads "Niall Gibbons". The signature is written in black ink on a white background.

CEO, Tourism Ireland

Our two biggest priorities are to grow GB people's belief that the island of Ireland offers a holiday experience that is different to GB options, at a price that offers clear value for money.

Research among GB holidaymakers tells us that an island of Ireland holiday is mainly compared to other holiday options in England, Scotland and Wales.

While the level of GB visitors to the island of Ireland has declined sharply, so far this year domestic GB travel has risen significantly as people opt to stay even closer to home in times of economic uncertainty.

We also know from research that many British people have a latent desire to visit the island of Ireland. But this desire lacks urgency because people see a holiday here as not being significantly different to one in GB. Furthermore, they see the cost of a holiday here as more comparable to continental Europe and therefore significantly more than GB holiday options.

So, in order to drive growth, the island of Ireland needs to deliver two 'proof points' to GB holidaymakers:

- Prove to GB people that the island of Ireland delivers a significantly different holiday experience to GB holiday options.

Grow Difference

- Prove to GB people that they can easily find holiday value both travelling to and while staying on the island of Ireland.

Grow Value

Addressing GB holiday-makers' uncertainty about an island of Ireland holiday experience enables us to set stretching, but we believe, achievable growth ambitions.

Our aim is to grow visitor numbers and revenue ahead of projected GB outbound growth to comparable holiday destinations in Europe. In addition, we aim to grow island of Ireland tourism ahead of domestic GB growth.

We also plan a strong programme to drive Business Tourism growth from GB. Details follow later in the document.

Based on predicted GB outbound growth of 12.5% (2013 vs. 2009), our growth ambitions (2013 vs. 2009) are shown below. We will place a particular focus on growing holidaymakers to Northern Ireland and this is reflected in the table also.

	island of Ireland	Northern Ireland	Ireland
2009-2013			
Visitor Growth %	+17%	+22%	+15%

Maintaining, and wherever possible increasing, access to the island of Ireland will be key to achieving our goals.



Turn- around Plan

Tourism Ireland's Turnaround Plan for 2010 is comprised of 10 major marketing actions over two phases; Stabilisation, then Recovery.

The Stabilisation Phase consists of short-term actions to halt the decline.

The Recovery Phase is about medium-term actions to restore growth in GB.

The 2010 Turnaround Plan initiatives are designed to be impactful, innovative and above all focused on delivering tangible business growth.

In response to the sharp decline in GB visitor numbers Tourism Ireland has already increased investment in GB marketing in the second half of 2009.

This higher spend level will be maintained in 2010.

The following three pages contain details of the ten major marketing actions included in the 2010 Turnaround Plan:

1**RE-ENGAGE AND RE-ENERGISE THE GB TRADE****IN ORDER TO...**

Re-establish Ireland as a standout destination with key GB trade buyers

TO ACHIEVE THIS WE WILL...

- Launch and deliver a programme of:
 - in-market workshops and island of Ireland trade fairs to target new business opportunities
 - DIY fairs, on-line training and regular communication with key partners
 - Exploit our presence at the Best of Britain and Ireland event in March by holding an evening reception for over 200 group and coach operators
 - Put in place a new Account Management structure with immediate effect to better manage the business relationship with key partners
- DESIRED INDUSTRY INVOLVEMENT**
- Participation in events
 - Follow up with potential GB buyers
 - Strong continuous sales activity in GB

2**CREATE A WEEK-LONG "BIG BANG" FOR ST. PATRICK'S DAY****IN ORDER TO...**

Make St. Patrick's Day the biggest consumer event in Britain in the first quarter of the year

TO ACHIEVE THIS WE WILL...

- Deliver a headline grabbing consumer promotion supported by a nationwide consumer blitz in key cities
- Carry out national and local PR activity, alongside pioneering "social media" activity to amplify the programme of events
- Collaborate with third parties (e.g. retailers, media companies, Irish diaspora networks) to further raise the profile of Ireland as a holiday destination

DESIRED INDUSTRY INVOLVEMENT

- Participation in events
- Creation of added value packages

3**PROMOTE EXCELLENT VALUE****IN ORDER TO...**

Dispel the perception that island of Ireland is an expensive holiday destination

TO ACHIEVE THIS WE WILL...

- Become the first tourist board to run value-led TV ads from January 2010 onwards, supported by radio and on-line advertising
- Saturate the market with value offers and packages during St Patrick's Week
- Distribute a further 10 million tactical inserts during Q2
- Relaunch our "Value Golf" programme in Q1

DESIRED INDUSTRY INVOLVEMENT

- Creation of headline grabbing offers and added value packages
- Provide means of systematically measuring consumer response to activity

4**CARRY OUT A NORTHERN IRELAND TV AND RADIO PUBLICITY BLITZ****IN ORDER TO...**

Show the change and positivity in Northern Ireland

TO ACHIEVE THIS WE WILL...

- Exploit "Titanic - 100 years on" through the commissioning of TV programmes
 - Increase NI content on mainstream terrestrial networks by working in collaboration with key media partners
 - Secure TV and radio coverage to showcase NI product strength in motor sport, gardens and music
 - Showcase the diversity and richness of NI festivals at GB events such as Celtic Connections in Glasgow during January
- DESIRED INDUSTRY INVOLVEMENT**
- Clear communication of upcoming events and event programmes
 - Create motivating packages around key events

5**REINFORCE OUR CULTURAL DIFFERENCE****IN ORDER TO...**

Address doubts about how different the island of Ireland is to GB

TO ACHIEVE THIS WE WILL...

- Put in place 6 themed activity programmes, starting with a "Born in Ireland" genealogy activity in February and a "Celebrated in Ireland" showcasing of festivals in March
 - Collaborate with relevant cultural institutions and commercial third parties throughout the year to exploit themed activities
- DESIRED INDUSTRY INVOLVEMENT**
- Communication of relevant events to support cultural themes
 - Create motivating packages linked to cultural themes

6**PUSH THE VALUE IN BUSINESS TOURISM****IN ORDER TO...**

Make the island of Ireland top of mind for Business Tourism buyers looking for a good value venue for corporate meetings / conferences and Association Conferences (national and international)

TO ACHIEVE THIS WE WILL...

- Launch a new value-led advertising campaign in Q1 2010
 - Launch a programme of fixed price conference offers
 - Position Belfast strongly for domestic conferences
 - Upgrade the irelandmeansbusiness.com website
- DESIRED INDUSTRY INVOLVEMENT**
- Creation of headline grabbing offers and added value packages
 - Provide means of systematically measuring consumer response to activity
 - Create fixed price conference packages

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PROMOTE THE ISLAND OF IRELAND IN SURPRISING PLACES

IN ORDER TO...

Stimulate reappraisal as a holiday option

TO ACHIEVE THIS WE WILL...

- Creating a programme of promotions with high profile third parties to increase island of Ireland exposure in unexpected places (e.g. in homes, supermarkets, using mobile technology)

DESIRED INDUSTRY INVOLVEMENT

Provide contacts and potential leads

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LAUNCH A "MYSTERY WEEKENDS" PROMOTION

IN ORDER TO...

Create a real buzz and talkability about a new kind of holiday on the island of Ireland

TO ACHIEVE THIS WE WILL...

- Creating Britain's first ever "Mystery Weekends" promotion - you know you're going to the island of Ireland, but you don't know in advance where you going and what you'll do!
- Amplifying this with a massive publicity drive

DESIRED INDUSTRY INVOLVEMENT

- Work with GB trade partner to provide packages

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TARGET BUSINESS VISITORS

IN ORDER TO...

Convert a minimum of 10% of business visitors to come on holiday in the future

TO ACHIEVE THIS WE WILL...

- Putting in place a programme targeting a minimum of 800,000 business visitors with communication and incentives to return to the island of Ireland for a holiday

DESIRED INDUSTRY INVOLVEMENT

- Collaboration with Irish Hotels Federation and Northern Irish Hotels Federation
- Mobilisation of members to deliver programme

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COMMUNICATE OUR BUSINESS TOURISM 'EASE AND EXCELLENCE'

IN ORDER TO...

Create a greater level of conversion for key island of Ireland Business Tourism destinations than competitors in GB and mainland Europe

TO ACHIEVE THIS WE WILL...

- Aggressively targeting national and international conference organisers as well as corporate buyers with a programme to demonstrate how easy it is to have a well-organised conference or meeting on the island of Ireland

DESIRED INDUSTRY INVOLVEMENT

- Help secure endorsements
- Participate in familiarisation trips

The 2010 Turnaround Plan is a set of immediate actions to stabilise and then start to grow business from GB again. For the period 2010 - 2013 we have 5 Growth Priorities that will guide our marketing over the next four years.

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- | | |
|---------------------------|---|
| 1. Grow Difference | We will demonstrate how an island of Ireland holiday offers a different experience to one in GB. |
| <hr/> | |
| 2. Grow Value | We will demonstrate how value can be found both in getting to and holidaying on the island of Ireland. |
| <hr/> | |
| 3. Grow People | We will expand our targeting to include new types of holidaymaker as well as continuing to build key trade relationships. |
| <hr/> | |
| 4. Grow Fans | We will do more to turn existing strong visitor satisfaction into future tourism growth. |
| <hr/> | |
| 5. Grow Business | We will increase our focus on business tourism and grow confidence in the island of Ireland's ability to meet fundamental business event needs. |
-

The two biggest priorities above are "Grow Difference" and "Grow Value" because these confront the primary barriers GB people have in choosing the island of Ireland for their next holiday.

1 - Grow Difference



GROW Difference

1 - Grow Difference

We will demonstrate how an island of Ireland holiday offers a different experience to one in GB.

"it is almost like you are holidaying in England or Wales or Scotland. Ireland doesn't seem like an international holiday, the cultures are so close together, the islands are too close together, it doesn't feel as though you are escaping anywhere."

**PROSPECTIVE VISITOR
LONDON**

Our Marketing To Date

An important concern of prospective visitors to date has been uncertainty about whether they will have enough things to see and do on holiday on the island of Ireland.

Our marketing has focused on showing consumers that the island of Ireland offers no shortage of things to see and do. Research indicates we have made progress in getting this message across.

The Challenge We Face

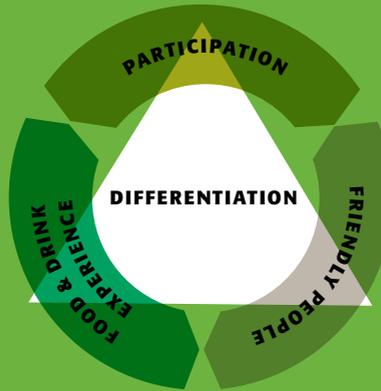
More and more holidaymakers are looking for different experiences. Research shows that the island of Ireland is not seen strongly as a unique holiday experience.

Basing our communication on 'lots to do and see' on the island of Ireland does not go far enough to address people's primary perception barrier – that the island of Ireland will not provide a particularly different experience to a GB holiday.

Furthermore Northern Ireland, being part of the UK, increases the need to emphasise the different experience Northern Ireland offers versus England, Scotland and Wales.

2010-13 Growth Action We will communicate the uniqueness that the island of Ireland offers by highlighting our engaging experiences, our friendly people and our local food and drink.

We will communicate festivals, events and distinctive attractions that invite participation.



Our research shows that people expect to enjoy a unique experience as well as enjoying our wholesome and nourishing food and our unique selection of beverages.

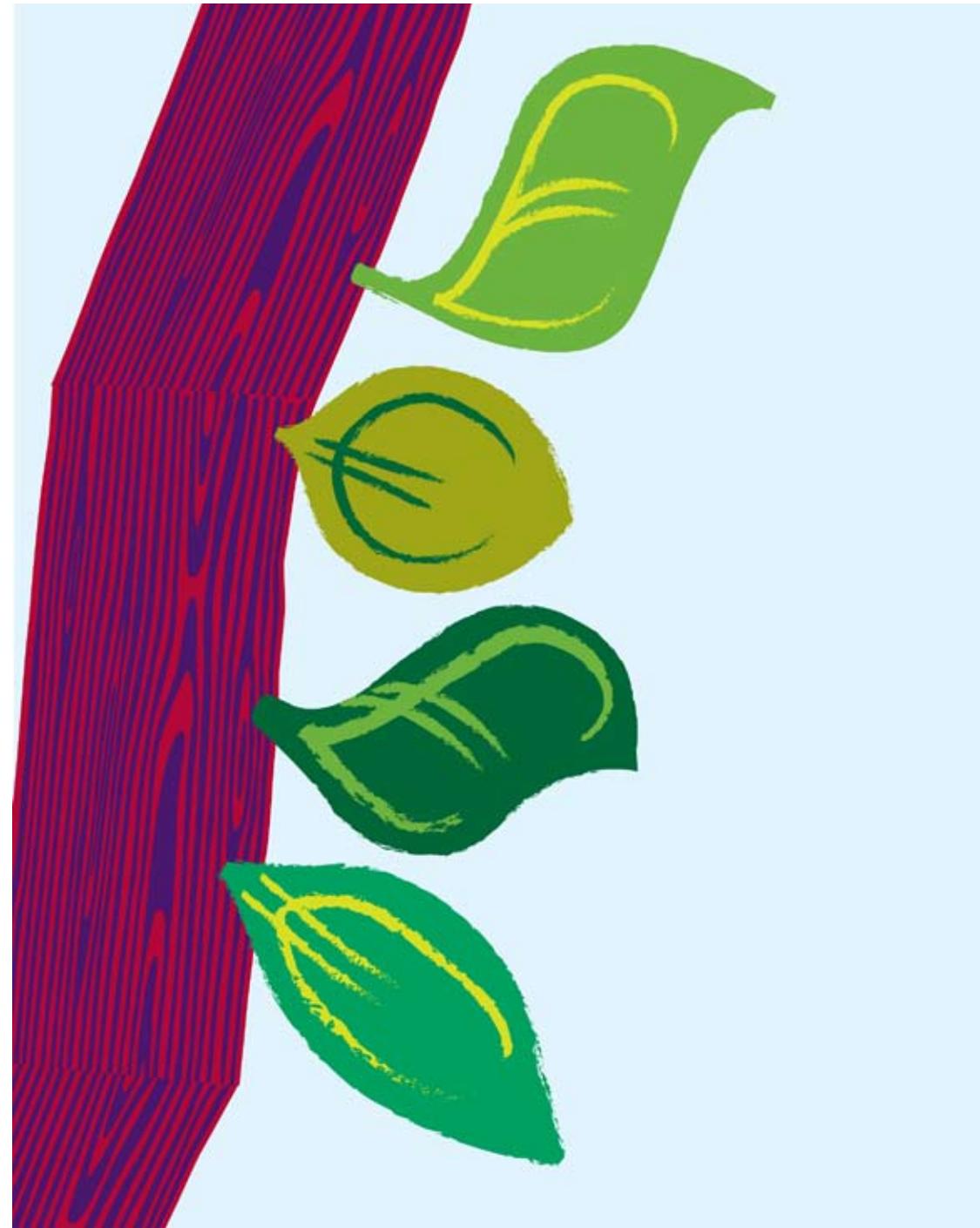
Our reputation for friendly people is our strongest asset. Communications will do more to bring alive characters from the island of Ireland.

Making It Happen

Ongoing product development is key to enhance the different experience the island of Ireland offers versus domestic GB holidays.

We will:

- Re-focus communications to highlight the strong difference the island of Ireland offers versus a GB holiday.
- Communicate the uniqueness of Northern Ireland in order to show how it differs from other parts of Great Britain.
- Raise the broader profile of the island of Ireland through distinctive publicity and events.
- Create a major innovation programme to help GB visitors view the island of Ireland with different eyes.



Grow Value

We will demonstrate how holiday value can be found when travelling to and holidaying on the island of Ireland.

Q. *"Why haven't you visited IOI?"*

A. *"I don't know why because it sounds fascinating. I looked at all the prices and it made me stop and think it was a lot of money."*

**PROSPECTIVE VISITOR
LONDON**

Our Marketing To Date

Recessionary pressures have placed increased emphasis on price and value.

A significant part of Tourism Ireland marketing investment has been used to promote special offers from the industry and carriers on the island of Ireland.

The Challenge We Face

The new economic reality has led people to challenge their assessment of value of most purchases, including holidays. Research tells us that GB people see Ireland as generally expensive and, while on reflection they expect Northern Ireland (as a non-euro economy) to be cheaper, this is not top of mind.

A weak sterling exchange rate is reinforcing people's value concerns about Ireland. There is also an opportunity to remind GB holidaymakers that Northern Ireland is a sterling economy.

Our challenge is to convince GB holidaymakers that they can find great value on their island of Ireland holiday.

2010-13 Growth Action **We will make value integral to our communication of the island of Ireland's 'escape promise'.**

Research indicates that 'escape' is still people's key consideration for a holiday.

But the price demanded to enjoy the 'escape' promise is increasingly critical.

We know that GB holidaymakers are uncertain about the value they can find on the island of Ireland and, in some cases, the value on offer to get here.

We need to create momentum and urgency around the message that an island of Ireland holiday offers a desirable escape at unquestionable value.

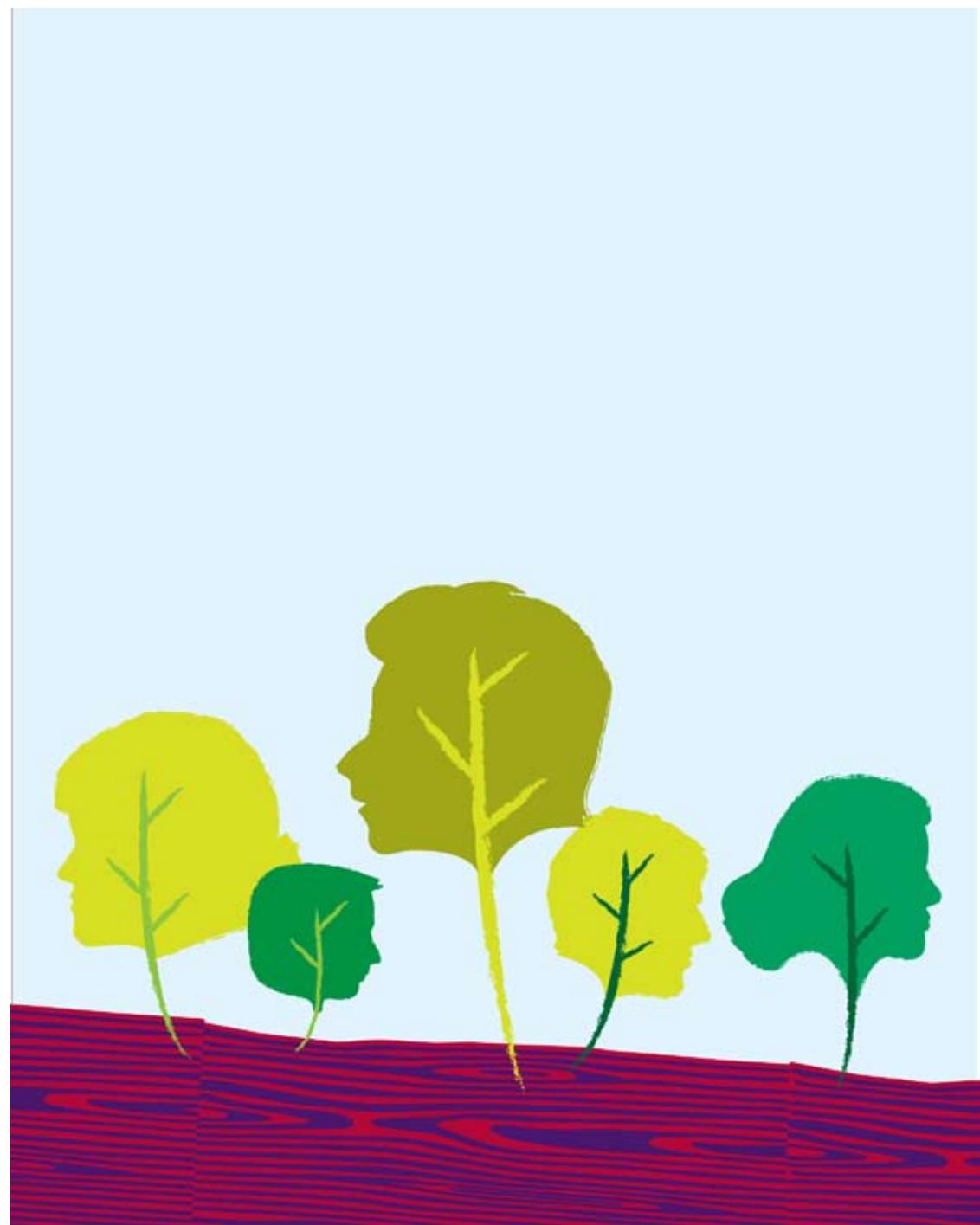
We will create momentum around the value offer through a combination of attractive and competitive prices, combined with added value that reinforce the difference between the island of Ireland and GB, for example bundled activities.

Making It Happen

It is critical that industry partners throughout the island of Ireland bring forward the best offers to compete successfully in the competitive GB market.

We will:

- Re-focus communications to make value integral to our 'escape' promise - using strong tactical advertising on key media.
- Create a major innovation programme to change value perceptions as part of our growth strategy.



Grow People

We will expand our targeting to include new types of holidaymaker as well as continuing to build vital trade relationships.

Our Marketing To Date

Tourism Ireland research divides holidaymakers in to different segments based on what motivates them to travel.

Tourism Ireland's marketing programmes have targeted a segment called Sightseers & Culture Seekers over the past number of years.

Their main holiday motivation is exploring a country's sights and finding out about its culture and we know that the island of Ireland delivers strongly for this group.

The Challenge We Face

This approach to targeting has worked in the past and a high proportion of ABC1 Sightseers & Culture Seekers have already visited the island of Ireland.

To drive future growth we need to reinforce our message amongst our core audience, but we also need to reach out and attract new people.

2010-13 Growth Action

1. Continue to target **Sightseers & Culture Seekers**

"It is quite interesting to see other cultures and things."

SIGHTSEER & CULTURE SEEKER - EDINBURGH

2. Expand targeting to include a holidaymaker segment called **Relaxers**; people whose main holiday motivation is relaxation and for whom hot weather is not a pre-requisite. This is a large holiday maker segment of which 43% have so far visited the island of Ireland.

3. Create initiatives to encourage people in the **Relaxer** segment who **Visit Friends** in the island of Ireland to turn their trip into a holiday or to return as a holidaymaker at the next opportunity.

4. Extend targeting to all people in all segments, beyond the upmarket 'ABC1' group to include the large 'C2' segment.

5. Building on the initiatives in the 2010 Turnaround Plan, we will identify and exploit new business opportunities amongst GB trade partners.

"I like to be able to chill for a few days and then have a couple of days running about doing things."

ALL WEATHER RELAXER EDINBURGH

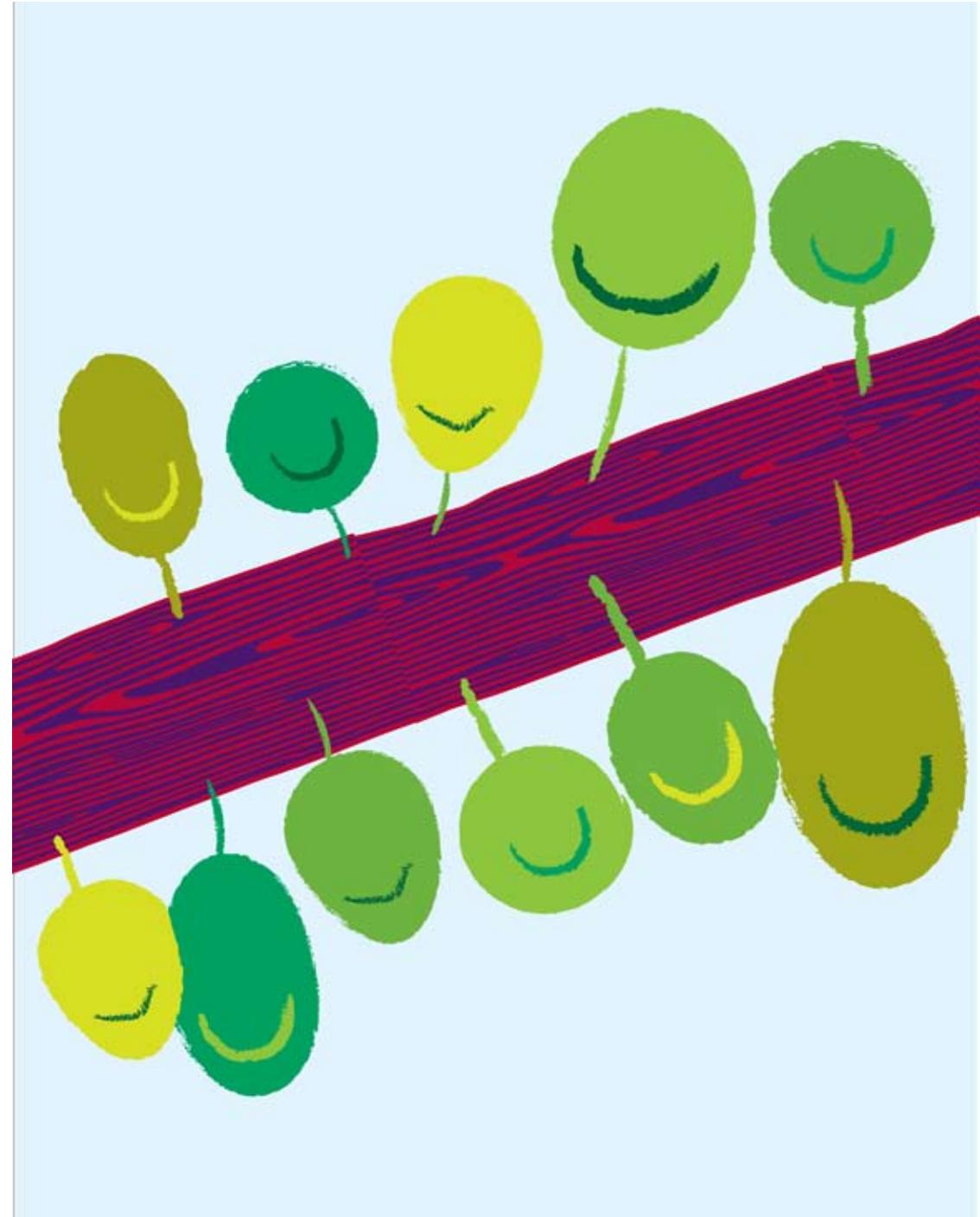
"I would probably stay with them for the duration but they would probably take me to places that they have been before and they enjoyed."

ALL WEATHER RELAXER - EDINBURGH

Making It Happen

We will:

- Use our understanding of **Relaxers** and **Visit Friends** segments to review and revise our use of communication channels.
- Deliver a GB market industry activation strategy.
- Deliver a Market Activation Programme to increase island of Ireland inventory sold through GB trade channels.



GROW Fans

We will do more to turn existing strong visitor satisfaction into future tourism growth.

"We went for a wedding over a week end and ended up staying two weeks. The people were brilliant."

**PROSPECTIVE VISITOR
LONDON**

Our Marketing To Date

There is an opportunity to target GB holidaymakers who have previously holidayed on the island of Ireland and been satisfied with their experience.

The Challenge We Face

Research shows strong satisfaction levels among GB visitors; between 76% and 86% on key measures such as 'Friendly People' and 'Beautiful Scenery'.

Tourism Ireland research also shows that the more often people visit, the more difference they see between the island of Ireland and other destinations and the more likely they are to become 'fans'.

Furthermore, when compared to visitors generally, visitors from GB are more likely to be visiting friends and relatives or business-related travellers.

Our challenge is to turn GB visitors' goodwill into a commitment to choose the island of Ireland for their next holiday.

2010-13 Growth Action **We will create initiatives that deepen existing visitors' connection with the island of Ireland so that they become 'fans'.**

We will create opportunities for satisfied holidaymakers to translate their goodwill into positive word of mouth communications about the island of Ireland.

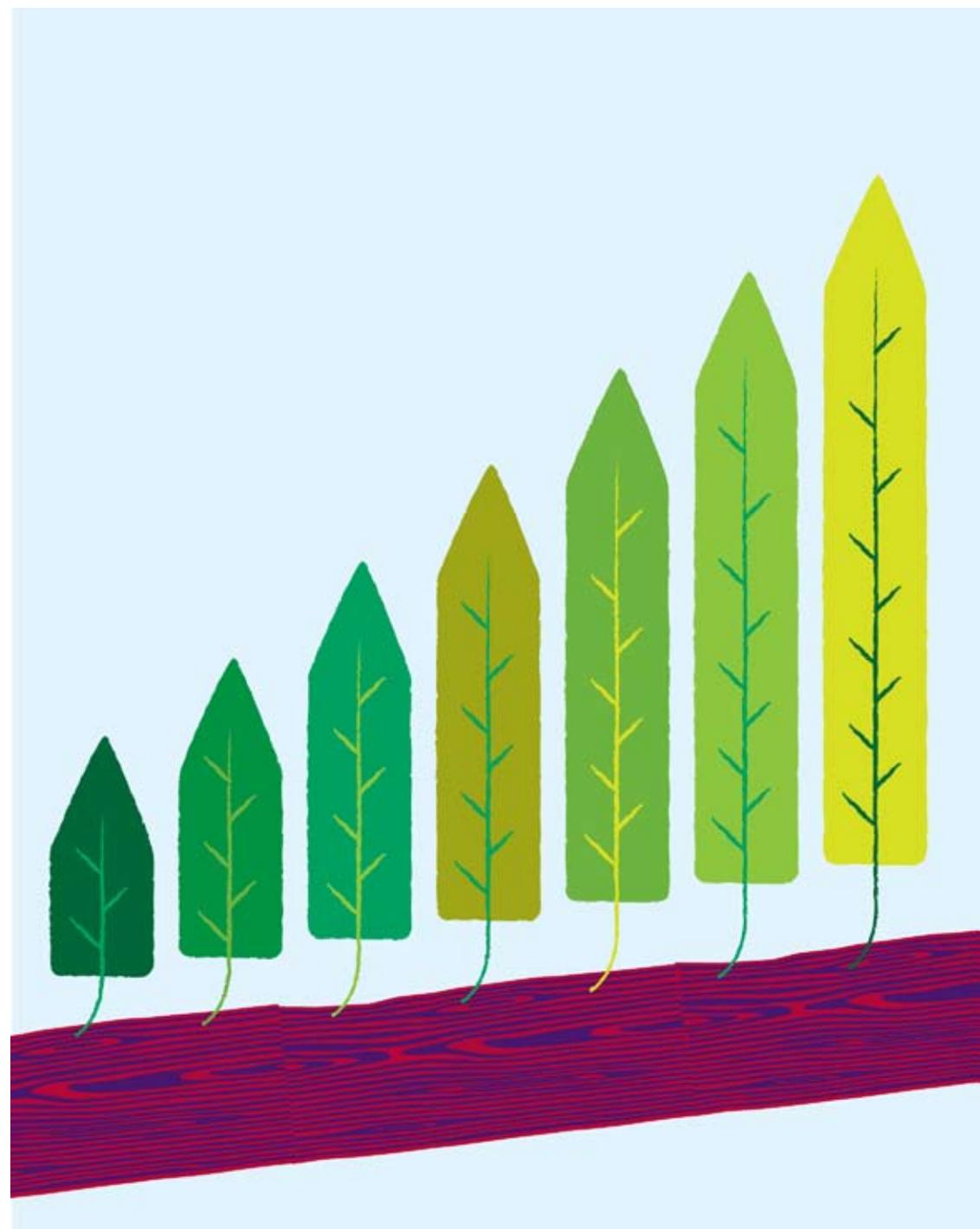
We will stimulate non-holiday visitors such as conference delegates and people visiting friends to re-consider the island of Ireland for their next holiday.

Making It Happen

We need to ensure that visitors feel they have received a uniquely island of Ireland experience on their trip.

We will:

- Harness online social networking in order to deliver word of mouth communication about the destination.
- Target previous visitors with motivating repeat visit messages.
- Work closely with the industry to target island of Ireland business visitors with leisure tourism messages.



GROW Businesses

We will increase our focus on business tourism and grow confidence that the island of Ireland can consistently meet the needs of business event organisers.

"Important that journeys aren't too complicated"
**GB BUSINESS TOURISM
DECISION MAKER**

"The calibre of the people is so important... they have to be behind you"
**GB BUSINESS TOURISM
DECISION MAKER**

Our Marketing To Date

Our focus to date has been around marketing to incentive and corporate meeting professionals.

The Challenge We Face

Our research shows that the island of Ireland performs strongly in terms of initial consideration as a potential business event destination but our performance declines when it comes to final destination selection.

Our perceived strength is in our delivery of added value to an event. Business Tourism decision makers are less clear about our access, venues and service for Business Tourism events, according to the research.

Feedback from GB business tourism decision-makers suggests that the communications they experience from the island of Ireland Business Tourism sector are less cohesive than some competitor destinations.

Soon the island of Ireland will boast two world-class large convention centres. This is a great opportunity to create fresh interest and drive growth.

Our challenge is to grow confidence in our ability to consistently meet all business event organiser's needs.

2010-13 Growth Action **Prove to GB Business Tourism decision-makers that a business event in one of our cities is easy to create and that our business service is always professional.**

We have identified six specific Growth Actions for 2010-13:

- 1 Prioritise the Association Conferences and Corporate Meetings sectors as targets.
- 2 Focus communication around the infrastructure in and ease of access to the three key business hubs: Dublin, Belfast and Cork/Killarney/Limerick. Focus on the unique position of venues in Northern Ireland to attract domestic UK association conferences.
- 3 Make these business hubs famous for excellence in business support through service innovation and publicity.
- 4 Strengthen our Value perception.
- 5 Continue to strengthen the perception of business event excitement offered by the island of Ireland.
- 6 Improve the cohesiveness of Business Tourism marketing across the sector and among all stakeholders.

Making It Happen

To deliver on our business tourism potential the island of Ireland must maintain access, enhance levels of professionalism and continue to drive competitive pricing.

We will:

- Increase Tourism Ireland resource behind Business Tourism programme.
- Develop and deliver a programme targeting Association Conference business.
- Work with the sector to create and deliver innovation that will enhance our service excellence reputation, our value perception and our excitement appeal.

- **THERE ARE MULTIPLE CHALLENGES IN RESTORING THE GB MARKET TO GROWTH**
- **OUR GREATEST PRIORITIES ARE TO GROW GB PEOPLE'S BELIEF THAT THE ISLAND OF IRELAND OFFERS A HOLIDAY EXPERIENCE THAT IS DIFFERENT TO GB OPTIONS, AT A PRICE THAT OFFERS CLEAR VALUE FOR MONEY.**
- **ADDRESSING GB HOLIDAYMAKERS' UNCERTAINTY ABOUT AN ISLAND OF IRELAND HOLIDAY EXPERIENCE ENABLES US TO SET STRETCHING, BUT, WE BELIEVE, ACHIEVABLE AMBITIONS.**
- **TOURISM IRELAND IS LAUNCHING A TURNAROUND PLAN FOR 2010.**
- **THE 2010 TURNAROUND PLAN COMPRISES 10 MAJOR MARKETING ACTIONS OVER TWO PHASES; STABILISATION, THEN RECOVERY.**
- **BUILDING ON THE IMMEDIATE ACTIONS IN THE 2010 TURNAROUND PLAN, WE HAVE ALSO IDENTIFIED FIVE 2010-13 GROWTH PRIORITIES THAT WILL GUIDE TOURISM IRELAND MARKETING OVER THE NEXT FIVE YEARS:**

1. GROW DIFFERENCE:

We will communicate the uniqueness that the island of Ireland offers by highlighting our, engaging experiences, our friendly people and our local food and drink.

2. GROW VALUE:

We will make value integral to our communication of the island of Ireland's 'escape' promise.

3. GROW PEOPLE:

We will expand our targeting to include new types of holidaymaker as well as continuing to build vital trade relationships.

4. GROW FANS:

We will create initiatives that deepen existing visitors' connection with the island of Ireland so that they become 'fans'.

5. GROW BUSINESS:

We will prove to GB Business Tourism Decision Makers that a business event in one of our cities is easy to create and that our business service is always professional.

We are grateful for the contributions made throughout GB Review by the Industry Steering Group whose members comprised:

Ms. Ruth Andrews, Irish Tour Operators Association
Ms. Kate Burns, Town and Country Homes Association
Dr. Tim Campbell, The Saint Patrick Centre
Mr. John Concannon, Failte Ireland
Ms. Helen Cousins / Ms. Julie Lynch, Irish Self Catering Federation
Ms. Hilary Finlay, The Blue Book
Mr. Steven Freudmann – Institute of Travel and Tourism
Ms. Janice Gault, Northern Ireland Hotels Federation
Ms. Laura Harvey, Northern Ireland Tourist Board
Ms. Margaret Jeffares, Good Food Ireland
Ms. Mandy Martin, Tourism Ireland Board Member
Mr. Eamonn McKeon, Irish Tourist Industry Confederation
Mr. Cormac O’Connell, Dublin Airport Authority
Mr. John Power, Irish Hotels Federation
Mr. John Walker, Oxford International

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Mr. Dermot Cairns, Stena Line
Mr. Enda Corneille, Aer Lingus
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