

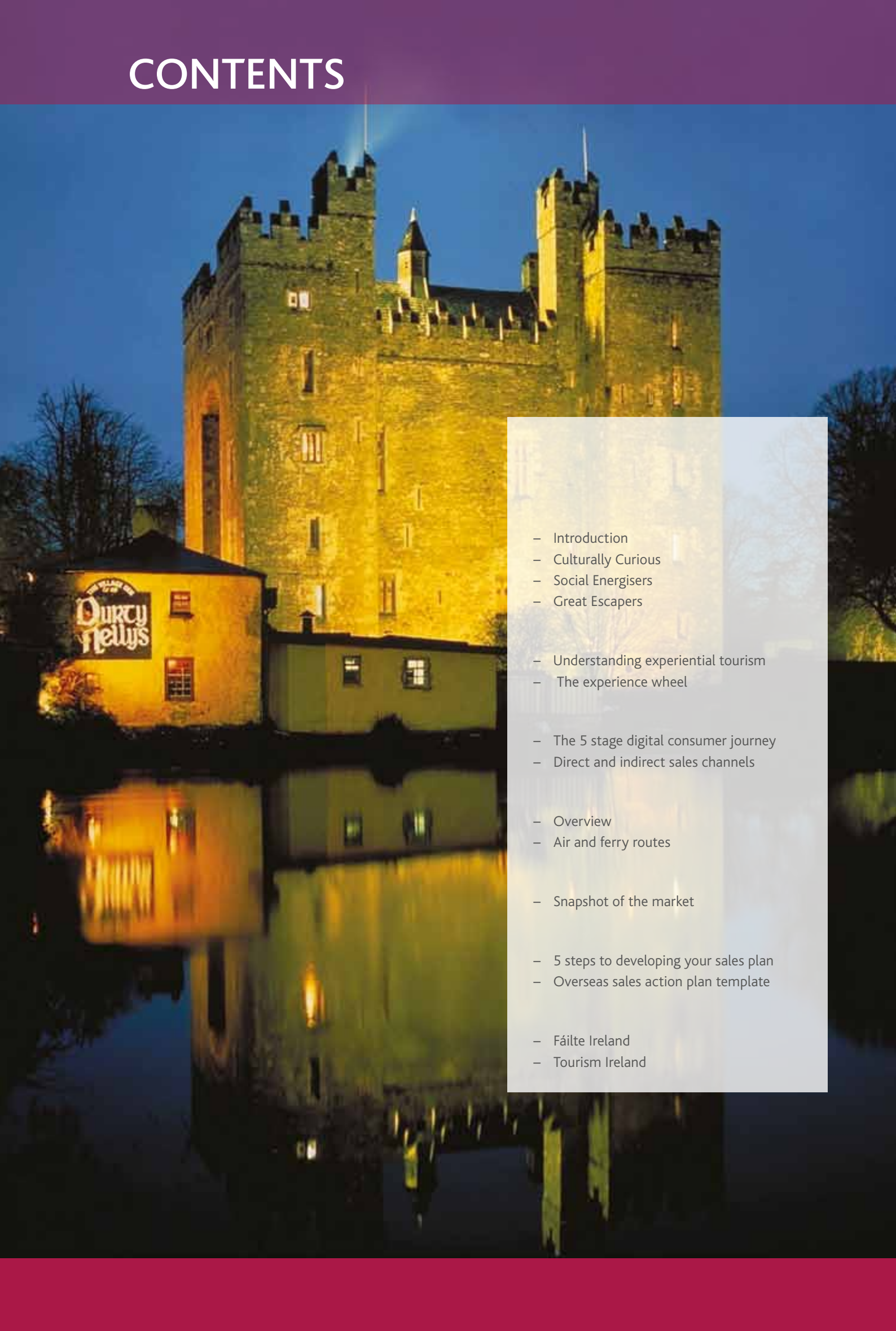
GROWING INTERNATIONAL SALES

Global Segmentation Toolkit

Using segmentation to win international sales



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INTRODUCTION

In 2013 Irish tourism saw a significant and well deserved growth in overseas visitor numbers with many markets now back or close to peak performance levels. Overall growth of 7.2% in 2013 was reflected in an increase from Great Britain (GB) of +5.6%, the United States (US) +14.5%, Germany + 7.7% and France + 9.4%. For the first nine months of 2013, corresponding overseas revenue grew by +13% and holidaymakers by +13%. With growth of +11% between December 2013 and February 2014, the positive start to 2014 is reflected in all the main source markets; visitors from North America (US & Canada) have increased by +17%; GB +14%; Germany +16% and France + 5%.

Tourism Ireland's target for 2014 is 8.2m overseas visitors, an increase of 1 million over 2013. While the trading environment in most source markets remains challenging there are positive indicators. To secure this growth Ireland must win additional market share in the main markets and in a determined effort to do this, the tourism agencies on the island of Ireland are jointly implementing a new, evidence-based consumer global segmentation model.

This model provides new, unique insights about the key consumer segments; their motivations, the kinds of experiences they will buy, associated market differentiators and the key channel intermediaries they use.

Three segments have been prioritised as:

1. Culturally Curious

2. Social Energisers

3. Great Escapers

Culturally Curious tend to be slightly older, are very independently minded and are interested in places of historic and cultural interest. **Social Energisers** tend to be young, looking for new experiences and excitement. **Great Escapers** are all about getting away from it all, renewing family bonds and spending time together in a beautiful place.

This toolkit, **Growing International Sales**, forms part of a series of sales capability supports for Irish tourism industry to aid in better targeting and more effective selling into the right channels and overall to grow international sales.

BRAND IRELAND

A holiday in Ireland must present and deliver a credible and engaging memory to potential visitors. Research indicates there are five different Irish holiday pillars that are highly motivating for international consumers.

- 1. Living historical stories
- 2. Awakening the senses
- 3. Active in nature
- 4. Vibe of the city
- 5. Connecting with people

Festivals and events are a vital component that underpin the five pillars while connections with people are important across all pillars. As well as being credible with international holidaymakers, developing powerful experiences will help differentiate Ireland from competitor destinations.



GLOBAL SEGMENTATION



Introduction

The new global segmentation model is the result of two key reports from the Tourism Recovery Task Force; *GB Path to Growth 2012* and *Germany and France: A Strategy for Growth 2014*.

Extensive research was originally conducted in the GB market and once the model proved successful there, the idea of extending it to other markets was considered. Additional research in the US, Germany and France validated the segments and ascertained that they applied globally. It's worth remembering that between them, GB, the US, Germany and France deliver 70% of our international visitors.

Critically, the research found that, in a marketing sense, people are best differentiated by the values they hold and their individual motivations rather than by demographics or nationality. There are some local nuances across different geographic markets but the global nature of the segments is compelling. Such market nuances should be reflected on when planning your communication and engagement with consumers.

What is segmentation?

Segmentation is simply the grouping of people according to some criteria. The new model, based generally on values and motivations, underpins a whole range of decisions, not just specific holidays. For example, people may choose a different type of holiday (e.g. activity, relaxing) at different periods of the year, but fundamentally they are still motivated by the same values. The new model looks at why people take holidays and what they want to feel from that holiday, both during and after.

The model also allows for the fact that people from very different demographics may hold similar values - just because somebody is over 50 does not mean that they suddenly only want to visit castles and gardens and drink tea...

Why global segmentation?

The global segmentation approach is different to those previously employed to promote Irish tourism. Focusing on motivations rather than needs, it delivers rich insights into potential visitors, enabling more effective targeting and more efficient use of resources.

Which segments?

When choosing which segments to prioritise, the decision was based upon Ireland's ability to:

- Bring the segment from 'I'll someday' to 'I'll come now'
- Address the current barriers to conversion by presenting the segment with a fresh and positively surprising take on Ireland
- Capitalise on a segment's warmth towards Ireland. If a segment is not 'warm' it will be much more difficult (and expensive) to convince such holidaymakers to holiday here.

Fáilte Ireland and Tourism Ireland have prioritised three segments in the four main markets of GB, US, Germany and France.

1. Culturally Curious
2. Social Energisers
3. Great Escapers

SEGMENT OVERVIEW

Culturally Curious

Who are they?

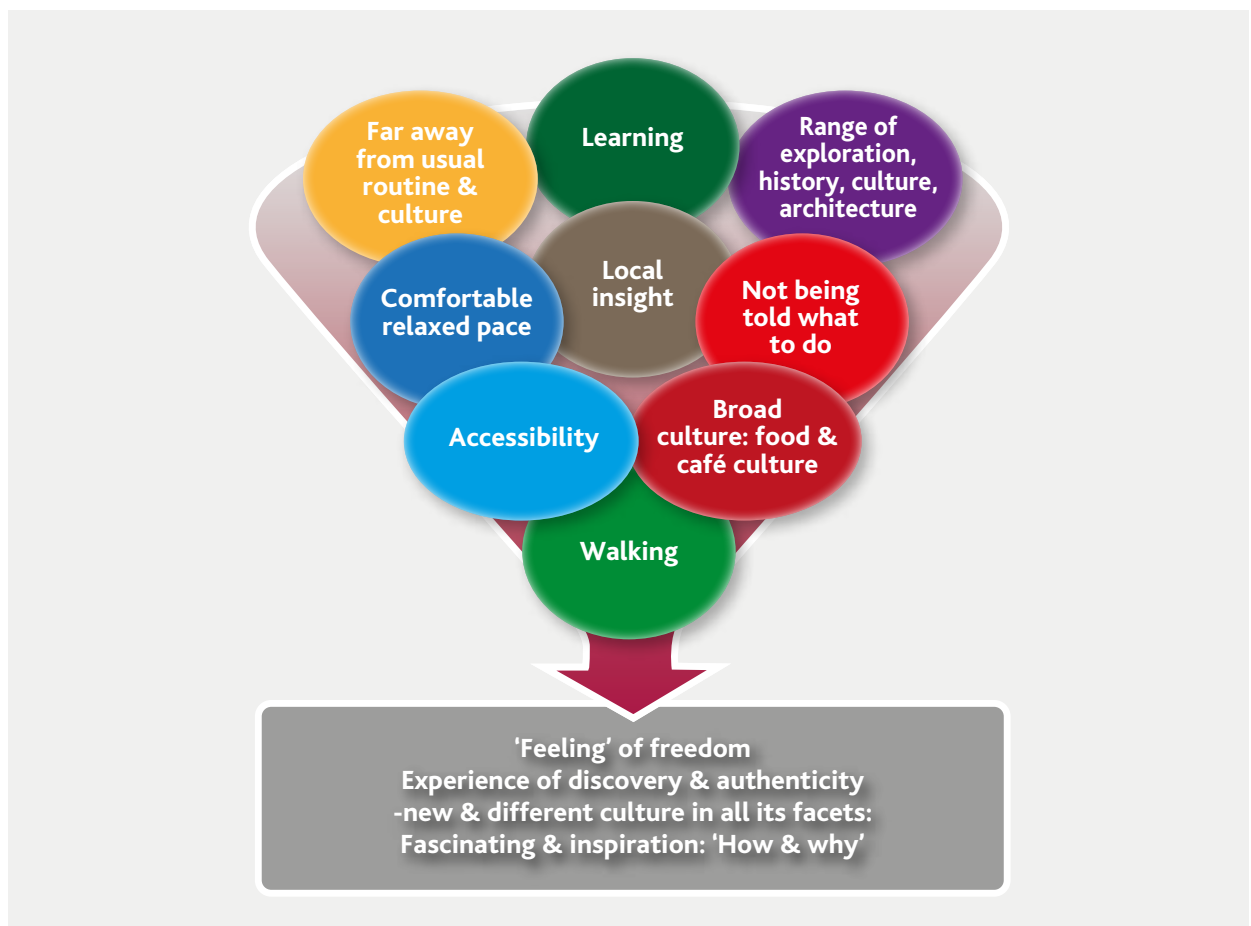
They choose their holiday destinations carefully and are independent 'active sightseers' looking to visit new places. They want to 'do a place' and are unlikely to return for some time once they have visited it. They travel as couples or on their own. If they have children, they have grown up or have left home. Higher proportion of single adults and couples, fewer family groups, slightly biased towards females.

Typically Culturally Curious travellers are out to broaden their minds and expand their experience by exploring new landscapes, history and culture. They are curious about everything and are delighted to discover the world for themselves once again. Most Culturally Curious are around 40 or over.

What they want from a holiday

They're interested in all that a place has to offer and they want it to be authentic. They won't choose a brand or visit a place just to follow the herd. This is their own exploration and they really want to cover everything, to 'do' a place. The Culturally Curious love to discover history and always find ways of getting real insight. They are looking to encounter new places and experiences that are out of the ordinary. The Culturally Curious like to feel that they have not only broadened their mind but also immersed themselves in a place, giving their senses a holiday too - the sights, the sounds, the smells, the tastes. They enjoy connecting with nature and getting off the beaten track. They like people to show an interest and educate them - to feel they've connected. They really appreciate personal guides.

Culturally Curious: Self-directed rich discovery





What they don't want

To party, to see things they've seen before, to do packages or 'laid on' activities, to be told what to do.

Most likely to be seen doing

- Exploring landscapes - Megalithic or early Christian relics
- Castles, gardens, museums, country houses and art galleries
- Literary tour, UNESCO site, visitor centre, browsing for books to deepen their experience
- Enjoying good food and wine, particularly local specialities
- Unique local festivals and events
- Gentle exploration of the place - walking, cycling, pleasure boating

Holiday behaviour - how long and where?

Culturally Curious are most likely to stay in a hotel, self-catering accommodation or a B&B as long as there's a lot to see. They will usually choose somewhere with access to scenery and good walks. They are three times more likely to take long breaks than average but they also take more short breaks than average, both at home and overseas. They are unlikely to return for a while unless a destination is truly diverse, preferring to move on to new discoveries.

What are they likely to pay more for?

- Something that is out of the ordinary
- Superior service - "people recognise me by name"
- Interested - "knows me, knows what I want"
- A human guide that offers real insight into the history of a place
- Environmentally friendly features

What makes a great food and drink experience?

- Get the best table and be well looked after
- Peace and quiet with good wine and food
- Classic Irish menu with a twist
- Good quality food because "I'm looking after my health"
- Personalised service where people call me "Mr....."
- Mid morning breakfast "so I can sleep in..."

Media habits

- Their use of social media is growing
- Medium to heavy TV which drives some online search
- Lighter internet usage - preference for search rather than social media
- Newspapers are prominent
- Radio is important.

**Social, Local
Mobile**

SEGMENT OVERVIEW

Culturally Curious: Digital Personas

CULTURALLY CURIOUS - UK

NAME
Vanessa

AGE
38

PROFESSION
High School Principal

Meet Vanessa, she is a fan of things of beauty, photography, new design, music, mixology and fine cuisine from the world over. She loves photography exhibitions and uses her smartphone to share images from the world over, from her trips abroad to sharing artistic photos around her. She embraces Instagram to share her photos to a wider community using relevant hashtags like #regram and #tbt (Throw back Thursday)

As an active person she is constantly looking for new experiences that take her off the beaten track. She likes walking tours around major European cities as she is looking to see what each city can offer her outside of a tour bus. When researching a holiday she's looking for an authentic experience and researches on multiple sites to determine what galleries and museums to visit and small intimate places to stay.

Interest/Hobbies	Barriers to visiting	Digital Interest Touch Points	Digital Travel Touch Points
<ul style="list-style-type: none"> Photography & Design (Creative Design) Cookery (Ivy Manning) Keeping Fit (London Strollers) Music and Theatre (West End & Cirque du Soleil) 	<p>Not aware of the outdoor activities that Ireland has to offer.</p> <p>Believes that Ireland has a limited food offering from a fine dining perspective.</p>	<ul style="list-style-type: none"> Huffington Post Creative Design BBC News Instagram (Sharolyn Wise) Buzzfeed Radio Times Guardian Guide Reuters Gawker 	<ul style="list-style-type: none"> Guardian Travel Culture Trip In the Know Traveller Lescape British Travel Blog Mr & Mrs Smith Lastminute.com Timeout London World Travel Market

Implications

Visual content appeals to Vanessa including informative articles showcasing culture news, galleries, crafts, photography and food. High quality photographic content that can be used standalone and within articles and distributed to visual social channels like Instagram and Pinterest with relevant social tagging is important to connect with Vanessa. From a distribution perspective, it's important that our content reaches food, travel and culture-based blogs and online publications to reach Vanessa.

CULTURALLY CURIOUS - USA

NAME
Kevin

AGE
36

PROFESSION
Social Media Manager

Kevin, a social media manger for a mid-size corporation enjoys keeping fit and follows Nike & New Balance to find out about the latest equipment. He also frequently checks into Pilates studios as well as letting his followers and colleagues know about new health products. A knowledge seeker, he is constantly engaging with current digital trends and reading up on entrepreneurship.

He is a keen traveller who has been to Europe a number of times. He considers Rome, Budapest, Prague and Greece some of the best places he has visited due to their mix of ancient and modern. He likes to travel with his partner and both enjoy checking out local, authentic venues and tasting local foods. He is also quite active in his exploration of new places – always bringing his running/hiking boots so he can uncover new locations by foot. When searching for new places to explore, Kevin relies heavily on peer to peer recommendation sites as well as visiting trusted blogs.

Interest/Hobbies	Barriers to visiting	Digital Interest Touch Points	Digital Travel Touch Points
<ul style="list-style-type: none"> Music Social Media Fashion Health and Fitness Television (HBO Series & Mad Men) Technology (Windows Surface & HTC) 	<p>Doesn't see Ireland as offering the depth of diversity he seeks in terms of landscape, culture and history.</p>	<ul style="list-style-type: none"> TedX & Wired Globalizer The Cultural Calculator Simply Measured Art on Air Huffington Post KickStarter YouTube Twitter 	<ul style="list-style-type: none"> Virgin Atlantic Trip Advisor Yelp Porter Airlines Getaway Magazine Business Travel News CAA Neo Travel About.com Travel Tripbase

Implications

The type of content which appeals to Kevin is that which brings to life the background history of a place – merging old with the new. As a Social Media Manager he responds well to peer to peer referrals, and is highly engaged on social platforms such as Twitter and YouTube. He is attracted to high quality video and photo content, and 'snackable' content such as Top 10 Lists. Social listening is critical to identifying and engaging with Kevin when he is online discussing his possible travel plans.

CULTURALLY CURIOUS - GER



NAME
Alexander Gorny

AGE:
45, Married

PROFESSION:
Engineer, BMW

Alex is an engineer at BMW's primary production plant in Milbertshofen, Munich, heading up a vehicle testing team.

His logical and curious mind translates into his holiday research habits. He engages in meticulous research pre-trip, talking with friends to get specific recommendations and researching official tourist sites to really discover the must-dos of an area, planning every detail of his trip in advance. In addition to reading the Sunday Travel newspaper supplements, he accesses information via his iPad, mostly searching in the evenings and at weekends.

Recent trips of note with his wife Doris have included a two week coastal trip of Croatia, visiting the world heritage sites of Dubrovnik, Split and the Plitvice Lakes National Park, and a Danish adventure to the scenic beauty of North Jutland and the historical epicentres surrounding Kronborg Castle and Roskilde Cathedral. He always travels with his iPad and iPhone by his side, and Frommers & Lonely Planet Guidebooks.

Interest/Hobbies

- History
- Technology / Engineering
- Hillwalking / Trekking
- Iconic Scenery
- News / Current affairs

Barriers to visiting

- Looks for warmer climates
- Not aware of what Ireland has to offer
- Distance from Germany

Digital Interest Touch Points

- Spex
- Der Spiegel
- Re-publica
- Wuv.de
- Stern
- Wallpaper.com

Digital Travel Touch Points

- Tripadvisor
- AirBerlin & German Wings
- Travel Made Simple
- Slow Travel Berlin
- Frommers
- Lonely Planet

Implications

Content should seek to educate i.e. informative articles that give Alexander a clear sense of what a destination has to offer. Content should be distributed to a mix of OTAs, third party interest sites and travel sections of media publications. Itineraries and regional brochures play a key role in helping Alexander plan and enjoy his trip, so having e-brochures and itineraries easily accessible as PDFs is important. Likewise, all content needs to be mobile friendly, and packaged up within apps which he can use while on holiday.

CULTURALLY CURIOUS - FR



NAME
Cedric Buisson

AGE:
57, Married no kids

PROFESSION:
Sales Manager

Cedric comes from Lyon. He and his wife, Celine, like going on romantic 'learning' breaks, together having explored Pompeii and Herculaneum, and have taken a two week tour through Transylvania, Bulgaria and the Balkans. He follows Adventure Holiday Providers & Nouvelle Frontières for ideas on upcoming trips. He sees himself as a free-spirited adventurer, despite putting a lot of effort into planning every step of his trips.

With a hectic work schedule, he likes to unwind by watching documentaries and particularly likes Bernard Natan films. Cedric also likes the theatre and is a regular attendee at Lyon's Halle Tony Garnier Theatre. He is also a fan of the Night Museums.

He follows Le Monde, Le Figaro, Le Point and Le Nouvel Observateur on Twitter to stay up to date on current affairs. A foodie, he refers to the Guide Michelin and the La Fourchette food review site when choosing places to eat.

Interest/Hobbies

- Documentaries
- Arts, Culture & Theatre
- Literature
- Museums & Galleries
- Current Affairs

Barriers to visiting

Weather and price, believes that Ireland's weather is always bad! Also price is a contributing factor. He is looking for value.

Digital Interest Touch Points

- Aventures en Islande
- Culture Spaces
- nuitdesmusees.culture.fr
- Le Monde
- Le Nouvel Observateur
- La Fourchette

Digital Travel Touch Points

- www.viamichelin.fr
- Lastminute.com France
- Voyages-sncf.com
- www.voyage-prive.com
- Expedia.fr
- www.homair.com
- www.gralon.net

Implications

The type of content that resonates most with Cedric is long form articles from reliable sources, i.e. respected travel bloggers and travel sections of media publications. Therefore, relationship building online with key influencers is critical to helping Cedric to decide which destinations to visit (consideration stage). Paid media on OTAs and review sites will also be key in creating initial visibility.

SEGMENT OVERVIEW

Culturally Curious: Subtle differences between the markets

Across the four main markets, patterns and key motivations for the Culturally Curious segment are more alike than different.

- **GB Culturally Curious** like authenticity, are independent and want to immerse themselves in a place. They like connecting with people, nature, exploring cultural sites and having fun. Won't choose a place to visit to just follow the crowd.
- The **US Culturally Curious** are significantly more interested in things that are new to them, mind broadening and knowledge building. Will have done research and selected their preferred experiences. While U.S. Culturally Curious are more likely to be interested in feeling special or spoiled, this is still well below 50% of them.
- **German Culturally Curious** are slightly more likely to be interested in peace and quiet, active outdoor and coastal areas. They have less need for the 'wow' factor, so less superlatives are needed, and a greater focus on broadening the mind. There is also less focus on gourmet food. They, along with the French, have absolutely no interest in meeting and having fun with other tourists.
- **French Culturally Curious** show slightly less motivation for "fun and laughter" and "soaking up the atmosphere" - suggesting a very slightly more serious traveller than the global average. They are more into breath-taking wild beauty of the landscape and are also a little more likely to want to have heard something about a place before they go. They are slightly less likely to want to be physically healthier. Like the German Culturally Curious, they have no absolutely interest in meeting and having fun with other tourists.

Requirements

How does my business fit the Culturally Curious motivations?

What does my business offer that meets the specific wants of this segment?

What delivers on their desire to discover and learn about Irish culture?

What helps them connect with local culture and learn about local stories?

What allows them to immerse themselves in Ireland?



SEGMENT OVERVIEW

Social Energisers

Who are they?

Young couples/adult groups looking for excitement, new exciting experiences, fun, social holidays in somewhere new and different.

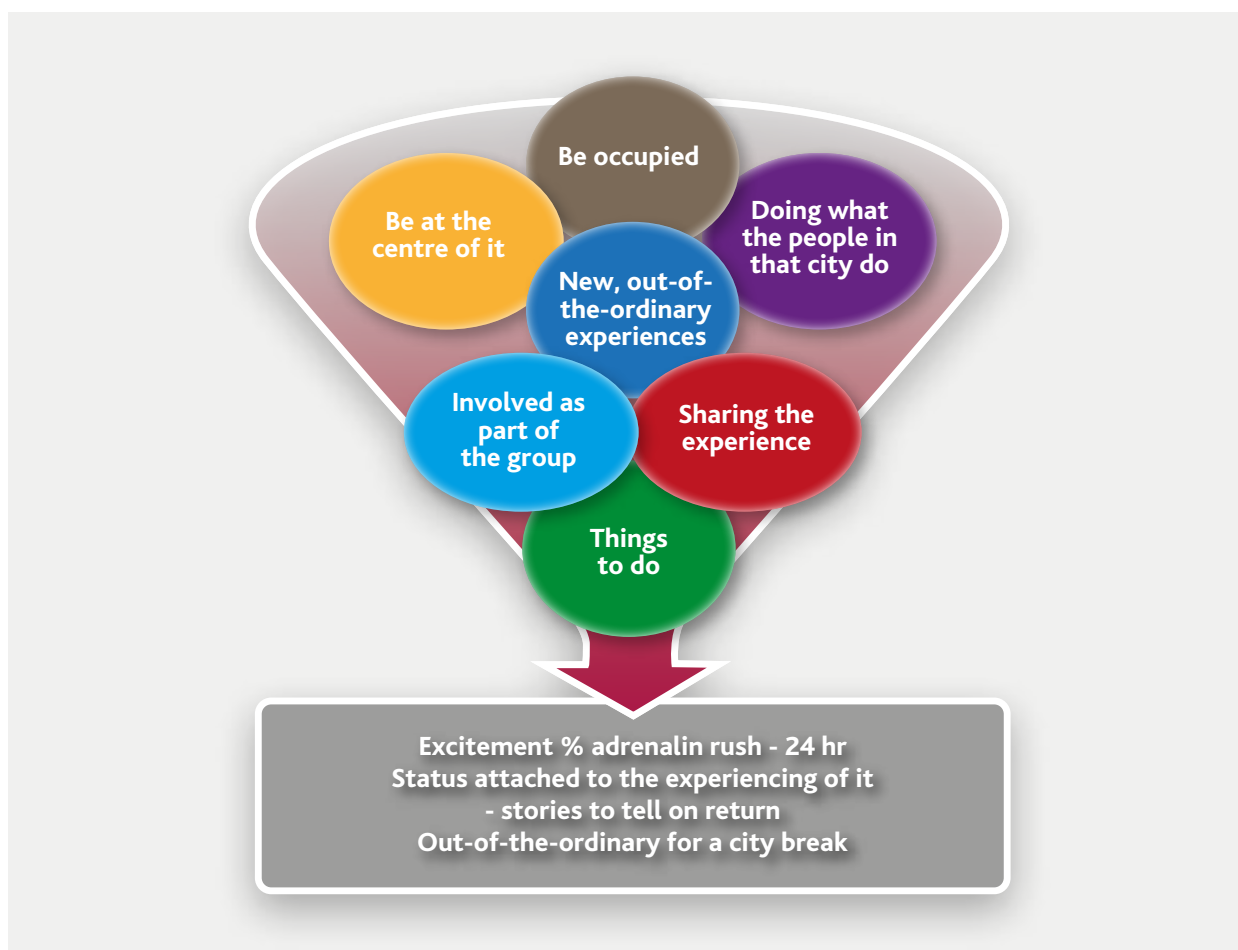
A good example: a group of 28 year olds on a long weekend in Dublin. They're friends or colleagues, looking for a cool, exciting trip somewhere new and vibrant.

What they want from a holiday

They really like having a laugh and sharing the adventure with their friends, they love new experiences and exploring new places - the more out-of-the-ordinary, the more exciting, the better. It's great if there's lots to do in a relatively small area, so they don't have to plan too far ahead. They're up for being spontaneous, as this often leads to even more fun and laughter and a really great break.

Social Energisers want to be at the heart of it all - wherever's social, wherever it's happening. But their definition of a good time is wider than just partying. They're also looking for interesting events, fun activities, gigs. Always ready to try new things - exploring the city by day for its vibrancy and unique atmosphere, as well as enjoying the nightlife. Social Energisers will go for something unusual as long as it has the 'wow' factor they're looking for. They're hungry for experience so they're likely to be packing everything in.

Social Energisers: Defining Fun & Excitement





What they don't want

Peace and quiet are off the agenda. As Social Energisers, they want to get back home revitalised not rested. They won't waste time searching for something or waiting for things to happen.

Most likely to be seen doing

- Latest energetic, popular activities
- Lively pubs, good food, music and conversation with locals
- Contemporary festivals, entertainment, comedy, street art
- 'In' places to shop, cool places to eat, best sightseeing opportunities
- Visiting attractions where fun is part of the deal

Holiday behaviour - how long and where?

Social Energisers are most likely to stay in a hotel close to the action. Some stay in B&Bs, guesthouses and hostels as long as there's a lot going on around them that's new and different. This is the most likely group to go to European cities and even further afield in search of these kinds of experiences. They are also more likely to take a shorter break of two or three nights.

What are they more likely to pay more for?

- Something that is out of the ordinary
- An all-inclusive package (flight, accommodation and car hire) makes it easy for them to get from one experience to the next
- A holiday offered by a well known brand

What makes a great food and drink experience?

- Great atmosphere
- A table in the centre of the action
- Trendiest restaurant in town
- Good wholesome foods that are local and tell a story
- Trendy cocktail list
- Artisan coffee and quality tea and coffee shops
- Brunch because "I like to party late"

Media habits

- Heavy social networkers - access to the internet wherever they are is vital
- Most own a smartphone
- Social media plays a big part in their lives
- Heavy internet users
- Light users of TV & print
- Cinema is popular

Inspire, Deliver
Stay in touch

SEGMENT OVERVIEW

Social Energiser: Digital Personas

SOCIAL ENERGISER - UK





NAME
Amanda Kennedy

AGE
28

PROFESSION
Marketer

Amanda works and lives in London and is a keen traveller as well as blogger. She has her own website and likes to keep up to date with different technology. She likes to go out with her friends to off the beaten track places like Burger Bear in London which serves burgers and a disco. She loves music and gigs and likes Frank Turner, Natives and follows digital music trends. This has lead her to set up her own SoundCloud account where she stores her favourite remixes.

She is very keen about discovering the new sites and sounds of London. She recently went to Norway to see the Northern Lights, the caves and the beautiful scenery. She is quoted as doing some of her best thinking on her bike. When she travels, Amanda is looking for the whole package of culture, nightlife and adventure.

Interest/Hobbies	Barriers to visiting	Digital Interest Touch Points	Digital Travel Touch Points
<ul style="list-style-type: none"> Photography Music and gigs: Frank Turner, Ventura Nights, Natives. Also recording music Cycling: Mountain biking Technology Nights out with friends: Cinema – Likes Beetle Juice and Run Lola Run 	<ul style="list-style-type: none"> Doesn't think Dublin is cool. More attracted to other European cities which have reputations for more vibrant cultural scenes and nightlife. 	<ul style="list-style-type: none"> Tech City News Made Good Bikes Perfect Pint SoundCloud & Groovespark Serious Eats Open Data Challenges Instagram 	<ul style="list-style-type: none"> Guardian Travel Culture Trip In the Know Traveller Mr & Mrs Smith Lastminute.com Timeout London Airbnb.com

Implications

With a love for unique features, content that pulls out the quirky and unusual places, menus and activities in Dublin, is key for Amanda. Short, punchy articles play a role in helping her plan a trip. Strong visual content such as photography and illustrated maps help to make a connection with her on visual social channels (Instagram / Pinterest). Using curated content from events and festivals, a relationship can be fostered direct with organisers that are genuine and authentic to Amanda. Keen to explore by bike, maps available offline and on mobile help Amanda when she visits a destination.

SOCIAL ENERGISER - USA





NAME
Eric Simmons

AGE
26

PROFESSION
Illustrator

Eric, a Connecticut native, has found his true home in hipsterville Williamsburg, Brooklyn. Working as an illustrator in a SoHo creative agency, he likes to think of himself as the official office culture culture, keeping everyone up to speed on cultural happenings in the Brooklyn hood.

He follows all his favourite local bars, restaurants and music venues on Twitter. He is keen to find out about special offers and upcoming events, and always eager to learn where a new bar is opening, or a party is about to kick off.

His Tumblr account provides updates on his fascination with street art, comics, tattoos and veganism. A gamer, he is a fan of Call of Duty and retro Nintendo games. He prides himself on making sure his t-shirt collection is one of a kind, buying regularly online from Threadless, Alternative Apparel and Opening Ceremony.

Interest/Hobbies	Barriers to visiting	Digital Interest Touch Points	Digital Travel Touch Points
<ul style="list-style-type: none"> Online Gaming Music Design/illustration Fashion Comics Street Art 	<ul style="list-style-type: none"> Distance between New York and Ireland seems vast. Lack of knowledge of Ireland's culture, restaurants, music and bars. 	<ul style="list-style-type: none"> CoolHunting Flavorpill Gothamist Twitter Facebook Instagram Tumblr 	<ul style="list-style-type: none"> Tripadvisor Airbnb Travels of Adam Fox Nomad VICE Magazine Thrillist.com

Implications

As a creative, Eric is attracted to high quality content. Illustrated maps naturally, but video and photo essays too. A discerning cultural critic, content needs to be unique and different to catch his attention. Always online, sharing his experiences through Twitter and Instagram is constant, while Tumblr is a window to his carefully curated tastes. He rewards good content via sharing. Social listening is critical to engaging with Eric.

SOCIAL ENERGISER- GER



NAME:
Sabina Hein

AGE:
32

PROFESSION:
Chef

When work finishes on a Saturday night, Sabina is often to be found at *Salon Zur Wilden Renates*, a house party venue with an actual underground labyrinth – perfect for checking out new bands. Sundays are all about flea markets - Mauerpark for vintage threads, GDR kitchenware and Nowkoelln for local art.

She loves Berlin in the summer when she and her friends take part in group Karaoke at Mauerpark, watch a film at the Friedrichschain Open Air Cinema, chill out at bars such as *Yaam* and *Chez Jacki* on the banks of the Spree, before taking a plunge in the barge-cum-pool of *The Badeschiff*. She has taken part in an afterhours museum crawl during the Long Night of the Museums.

She loves escaping the city to one of the nearby lakes. Holidays that combine her love of quirky urban experiences with outdoor adventure are perfect – a recent four day trip with her boyfriend to Istanbul blew her mind.

Interest/Hobbies

- Food
- Cinema
- Culture
- Creativity
- Nightclubbing

Barriers to visiting

- Has a perception that Ireland is not cool or contemporary.
- Unaware of the cultural activities and nightlife in Dublin.

Digital Interest Touch Points

- Facebook
- Food blogs - Kekstester and Multikulinarisch
- Candycrush
- Girlsgogames.de
- Kaltblut Magazine
- Electronic Beats

Digital Travel Touch Points

- Tripadvisor
- Proud
- German Wings
- Slow Travel Berlin
- Sueddeutsche Zeitung
- DK Travel
- Lonely Planet

Implications

Urban experiences around creativity, food and nightlife are paramount for Sabina, so content must reflect these in fresh and vibrant ways to attract her attention. Unique first person POVs and word-of-mouth influence her travel decisions as she seeks out the new. Using her tablet for online shopping and showrooming, Sabina browses for good offers and can make quick decisions, so content must be optimised for multi-screen browsing.

SOCIAL ENERGISER- FR



NAME
Victoria Moreau

AGE
28

PROFESSION:
Fashion Student

A fashion business student at MOD'SPE Paris, Victoria is determined to make it to the top of the fashion buying world. She has already established a voice for herself via her personal blog, Twitter and Instagram presences.

Ticketless, she watched the Dior Show live on Facebook, followed by a YouTube documentary around the Fendi Spring/Summer Show, 'Inside the Mothership'.

Using her Galaxy S3, she documents street style, jetting around the city easily with the help of her Paris Metro App. She watches a lot of videos on her phone, as well as listening to music via Spotify.

Interest/Hobbies

- Fashion
- Blogging
- City Breaks
- Food and Wine
- Snowboarding

Barriers to visiting

- Distance to Dublin is perceived to be too far for a city break.
- Doesn't come across relevant content related to her interest streams.

Digital Interest Touch Points

- Paris by Mouth
- Marie Claire
- Hipsters in Paris
- From Paris
- Garance Doré
- The Sartorialist

Digital Travel Touch Points

- Mr & Mrs Smith
- Luxe City Guides
- lastminute.com (France)
- Expedia.fr
- Airbnb
- Vogue

Implications

Personal brand is everything for Victoria. Forging her way in the fashion world, she updates her personal blog, Twitter and Instagram like clockwork. Between selfies and snapping street style, her life is recorded digitally and shared. Priding herself on personal recommendations from peers, facilitating relationships is key to connecting with Victoria. Content that champions the unique – e.g. craft beers, latest food trends and fashion - will appeal to Victoria. She seeks content that she can consume via mobile and visual social channels. (Instagram / You Tube).

SEGMENT OVERVIEW

Social Energisers: Subtle differences between the markets

- **GB Social Energisers** holiday in groups, mainly city destinations, like the spontaneity and partying atmosphere in cool and vibrant venues. Don't like to plan too far ahead.
- **US Social Energisers** are slightly more likely to be interested in the 'wow' factor, experiencing things that are new to them and are keen to soak up the atmosphere. Exploration is also slightly more important (they are coming from farther away than their European counterparts) as well as fun and laughter. Food and drink are more important to US Social Energisers than to others. US Social Energisers are slightly more likely to stay in a 4 star or mid-range accommodation.
- More so than other Social Energisers, **German Social Energisers** also want freedom, to be active and adventurous outdoors, rather than party. They are more into broadening their minds than partying. 50% of French Social Energisers rate partying but just 28% of Germans. However, for German Social Energisers, partying is still very strong relative to other things.
- **French Social Energisers** are more into partying and more into the beauty of nature and less inclined towards physical activity than other Social Energisers. They are also slightly less likely than the global average to be motivated by broadening their thinking. The single biggest difference between the French and other Social Energisers is that the French are much more motivated by partying.

Requirements

How does my business fit the Social Energisers' motivations?

What does my business offer that meets the specific wants of this segment?

Do I have a listing of fun events like 'What's on tonight?'

What is 'wow' or out of the ordinary close by?

Is there something unique/different that they can do and then brag about when they get home?



SEGMENT OVERVIEW

Great Escapers

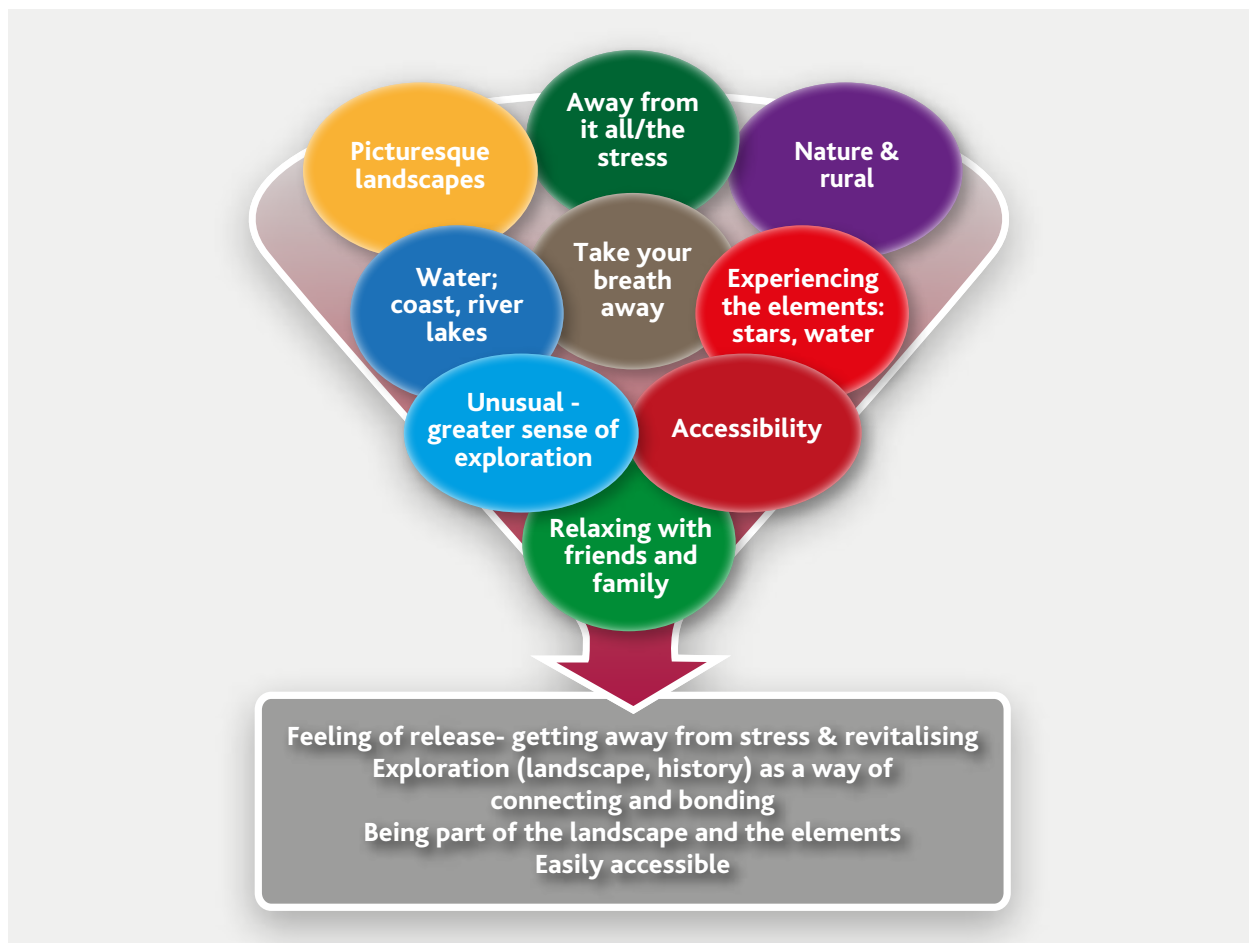
Who are they?

They are often couples, approximately 30 years old, some with babies or quite young children. Most are in serious need of time out from busy lives and careers. They are specifically interested in rural holidays and travel very much as a couple or family. Great Escapers are on holiday for a break, to get physical with nature, and to reconnect with their partner. More likely to take part in slightly more strenuous, but not extreme, exploration. More interested than other segments in getting connected to nature especially the more remote and exciting places.

What they want from a holiday

To connect with the landscape, to feel the earth beneath their feet, to soak up the beauty. A sense of history, of their place in the vastness of nature - they want to feel part of it. Against this kind of backdrop Great Escapers can spend real quality time bonding with those closest to them. They can rebalance themselves and take stock of their lives, concentrating on what's important to them. They appreciate peace and quiet between activities... the point is the trip itself. It's 'down time', it's being off the beaten track, it's a great escape. But it's important that getting away from it all is easy enough - they want the 'wow' factor without too much effort. Most importantly, Great Escapers want to come home refreshed and revitalised, their batteries recharged.

Great Escapers





What they don't want

To make connections with other people - locals or others on holiday - they don't need to, they're there to be with each other. They don't like crowded places.

Most likely to be seen doing

- Escaping to breath-taking landscapes
- Actively exploring more remote and exciting places, on foot or by bicycle
- Standing enveloped in each other's company on the top of a mountain or cliff
- Visiting a castle or a landmark
- Gentle exploration of the place - walking, cycling, pleasure boating
- Relaxed meal of fresh local produce, or a fun evening in an authentic pub

Holiday behaviour - how long and where?

They are likely to take more short breaks than the average visitor. Ireland offers plenty of what they're looking for.

What are they more likely to pay more for?

- Superior service - "people recognise me by name"
- Interested - "knows me, knows what I want"
- Something that is out of the ordinary
- Things that take the hassle away

What makes a great food and drink experience?

- An authentic experience in a local hotel or pub
- Great quality local food at a value price
- A good food quality children's menu
- A high energy breakfast and the option of bringing a picnic lunch
- A quiet room so I can unwind from my hectic schedule
- An Irish cheese board by the fire at night

Media habits

- Light to medium TV users, due to busy schedule and young children. Programmes choice often dictated by children
- Internet is key source of information for work and leisure
- Light-medium users of social media
- Light-medium use of newspapers; catching up on news online is popular
- Cinema visit every 2-3 months, often with children

SEGMENT OVERVIEW

Great Escaper: Digital Personas

GREAT ESCAPER - UK

NAME
John Gills

AGE
32

PROFESSION
Paramedic

John works as a paramedic with the North East Ambulance service – stress is part of his daily working life! To help de-stress, he runs 3-4 times a week with his local running club, Tyne Bridge Harriers, and aims for a half-marathon/marathon every year – the Great North Run is his favourite.

A yogi, he subscribes to Yogaglo, watching 'how to' videos so he can cram in a yoga session at home. He also follows a number of health and lifestyle sites like MindBodyGreen and ElephantJournal for daily positive pep-ups.

As an NHS employee, his salary doesn't allow an overly extravagant lifestyle, so he subscribes to daily emails from deal platforms like Groupon, Wowcher and Achica.

Interests/Hobbies

- Running
- Mountain biking
- Health Food
- Yoga
- TV Show – House of Cards, Game of Thrones

Barriers to Visiting

- Believes Ireland is expensive, particularly when it comes to dining out.
- Limited time is a factor, with a busy work schedule, his usual escapes are within close proximity to home.
- Unaware of diverse outdoor activities on offer in Ireland.

Digital Interest Touch Points

- The Independent
- The Observer
- The Times
- Netflix
- Yogaglo
- MindBodyGreen
- Elephant Journal
- Facebook
- Instagram

Digital Travel Touch Points

- Lastminute.com
- BBC Travel
- Travel Zoo
- SecretEscapes
- Guardian Travel
- TheJournal.co.uk
- The Sunday Times

Implications

Content that appeals to John needs to communicate speed and ease of access to a variety of activities, close to airport hubs. Although he likes to connect with nature in the moment, he also likes to post #latergrams of his adventures on Instagram and Facebook. Working every second weekend, his travel go-tos are supplement and lifestyle sites. He likes info in digestible formats, such as top 10 lists which are stuck on the fridge. Visual content that shows breathtaking landscapes are a key travel motivator. Mobile is key channel for him to access content.

GREAT ESCAPER - USA

NAME
Jen Nilson

AGE
35

PROFESSION
Interior Designer

Jen studied interior design and the arts before setting up her own studio in downtown LA. A mum of two, she spends her days juggling the needs of her young kids alongside the demands of her small business. Work-life balance is a constant struggle, weekly Bikram yoga classes, weekend bike rides and runs down the Santa Monica pier help keep her sane, but to really take a break from it all, she has to schedule in 'away time' for her and the family.

Together, they've already explored the Redwood Forests of the Yosemite National Parks, driven Lake Tahoe's spectacular Western Shoreline and got lost on the West Coast of France. She looks for opportunities to leave behind the trappings of city livings, turn off her iPhone and get close to nature, to help her rekindle her relationship with her equally busy insurance rep husband and her kids.

Interests/Hobbies

- Biking
- Interior Design
- TV Shows - Breaking Bad, Modern Family
- Healthy Eating

Barriers to Visiting

- Unaware of what Ireland has to offer in terms of natural beauty and outdoor facilities. Perceives Ireland as small, full of history and culture.
- Sees US national parks as very accessible – just load up the car and go. Ireland seems far away with two kids.

Digital Interest Touch Points

- Loves Apps! Whatsapp, Amazon, Nike+
- Wallpaper
- Apartment Therapy
- Design Sponge

Digital Travel Touch Points

- National Geographic Traveller
- LA Times
- Travel Zoo
- SecretEscapes
- Condé Nast Traveller

Implications

Content that appeals to Jen's daydreaming attitude to life is a must. Escaping and re-connecting with herself and her family are a priority, so content must reflect current lifestyle trends, such as digital detoxing. With a huge emphasis on healthy eating, content showcasing Ireland's food quality and traceability would appeal to Jen. For distribution, it is important content is hosted on Pinterest and makes use of Google's in-app display network to reach busy multi-taskers like Jen.

GREAT ESCAPER - GER



NAME
Conny Soddemann

AGE
37

PROFESSION
Art Gallery Owner

Conny is a 37 year old single mom of two. Having studied Fine Arts at Berlin University of the Arts, she went on to work in a number of art galleries in Berlin and Bremen, before returning to her home town of Köln to set up her own gallery.

She is particularly interested in the arts, theatre and music. Her other down-time activities include pilates, hiking and daily meditation. Hiring a new assistant for her gallery has finally given her the confidence to spend time enjoying travel. Generally, she looks for an easy escape, holidaying in neighbouring Austria, France or further afield to Spain. The North of Ibiza is her perfect escape haven.

When researching holidays, she generally uses Google search and sites like Booking.com, Tripadvisor, Homelidays and the Air Berlin website.

Interests/Hobbies

- Music
- Art
- Sun Holidays
- Pilates
- Meditation
- Art

Barriers to Visiting

- Unaware of what Ireland has to offer.
- Often holidays in in neighbouring countries, so accessibility may be an issue.
- Doesn't perceive Ireland to offer mix of great food, family getaways, culture and outdoors.

Digital Interest Touch Points

- Google
- Konkret Magazine
- Monopol Magazine
- Juice
- Intro.com
- Facebook
- Instagram
- YouTube

Digital Travel Touch Points

- Booking.com
- Airbnb
- AirBerlin
- Homelidays
- Tripadvisor

Implications

With a busy gallery and family life, spontaneity does not influence Conny's travel plans. During extensive researching, she seeks out family focused reviews, culture magazines and sites with 'Top Places for Family Holidays'. Peer-to-peer content instils trust and influences her decision making. Content found through family related keyword search is important for her.

GREAT ESCAPER - FR



NAME
Laurent Muzellec

AGE
40

PROFESSION
Designer

Laurent is a mother of three residing in the Côte d'Azur. When she is not working or looking after her children she loves to read magazines like French Morning and listen to the likes of Carla Bruni, Lescop and Les Femmes. She has a keen interest in Social Media and follows the French equivalent of the Social Media Examiner – Map Social. This gives her tips for her Twitter, Pinterest and blog. She longs for the perfect trip and reads blogs about the Seychelles.

She uploads photos of her trips and follows the Lonely Planet keenly for the perfect get away for her and her family. She looks at TMS travel and the Family on Bikes site to get inspiration as to where she and her family can have an alternative holiday. She likes wine and discovers the latest wines from sites like the Glass of Bubbly. She uses her Android smartphone to upload photos to Instagram and document her favourite designs from Pure Design International.

Interests/Hobbies

- Writing
- Reading
- Music
- Fine wine
- Food
- Cycling
- Skiing

Barriers to Visiting

- Doesn't perceive Ireland to be a destination of fine wine and dining.
- Unaware of range of activities available, only knows there is no skiing.

Digital Interest Touch Points

- French Morning
- Pure Design International
- WritersCarnival
- Pinterest
- Twitter
- Map Social
- Glass of Bubbly

Digital Travel Touch Points

- Familyonbikes.com
- Lonely Planet
- Trivago
- TMS Travel
- @Kids_away
- Blogger.com, healthy holidays, family travel

Implications

A keen Android smartphone user, mobile is a key content touch point for Laurent. With an interest in social media, she values genuine two way conversation and direct assistance. For this, social listening is ideal. Active on Pinterest and Twitter, visual content is important to her. Holiday research is always extensive, but not limited to travel sites. Lifestyle magazine on outdoor activities, fine wines and food also influence her travel plans.

SEGMENT OVERVIEW

Great Escapers: Subtle differences between the markets

A very similar pattern is visible across countries, with feeling connected to nature and spending time with my other half as 'classic' Great Escaper traits.

- **GB Great Escapers** like connecting with landscape, having quality time together and more likely to stay in self-catering accommodation in rural Ireland. Want 'wow' moments without effort and enjoying downtime off the beaten track.
- **US Great Escapers** value flexibility and freedom to change plans. They prefer to move at their own pace in an unrestricted way.
- **German Great Escapers** have an even greater focus on nature and getting rural than Great Escapers from other markets. They have less need for the 'wow' factor - they are more interested than others in simple nature and rural Ireland. The most marked difference from their global counterparts is the lack of importance of 'gourmet' food.
- **French Great Escapers** are less active when outdoors than Great Escapers from other countries. To balance that, they want more culture. They are less exploration focussed. French Great Escapers are less motivated than their US counterparts on a site being famous.

Requirements

How does my business fit the motivations of Great Escapers?

What does my business offer that meets the specific wants of this segment?

Where can they engage with nature to get that special quality time together?

Where can they get peace and quiet, personal service and relaxing atmosphere?



EXPERIENCES

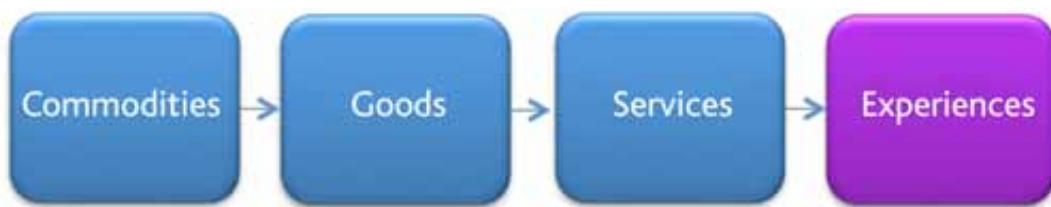
Delivering Memorable Tourism Experiences

A great tourism experience has a strong idea at its heart. It is something which one **does, sees** or **feels** which is (ideally) unique and distinctive to a particular place. It is inherently personal, engaging the senses, and making connections on an emotional, physical, spiritual, intellectual or social level; creating a lasting memory and **driving repeat and referral sales.**

A great tourism experience responds to the specific motivations of the Culturally Curious or the Great Escaper or the Social Energiser.

Understanding experiential tourism

For visitors today, it's less about 'doing' something and more about feeling that they are truly immersed in a place or an activity. An experience is what a visitor gains from the combination of the place, its attractions, products and activities, **and really importantly, it's about the people they encounter - along with the stories they tell.**



Think of it like this. If you buy fish from a fishmonger, you are buying a commodity.

If you buy a fish pie in the local supermarket you are buying a good.

If you order fish in a restaurant, you are buying a service.

But if you went to a cookery school in a beautiful part of the country for a week of relaxation and cookery classes, picked your fish at a local market, learned how best to prepare it in the local preferred style, maybe heard tales of how fishing has sustained the local community or indeed lend your hand at landing your own catch... and then finally got to taste the finished product.... that would be an experience!

And the Benefits?

For the visitor... The offer is more attractive and has greater potential to inspire and motivate the visitor to purchase. The experience is highly immersive and involving for the visitor, is of high quality, unique to the local place and people and overall delivers a high level of satisfaction for the visitor....resulting in wonderful holiday memories that are re-lived and shared!

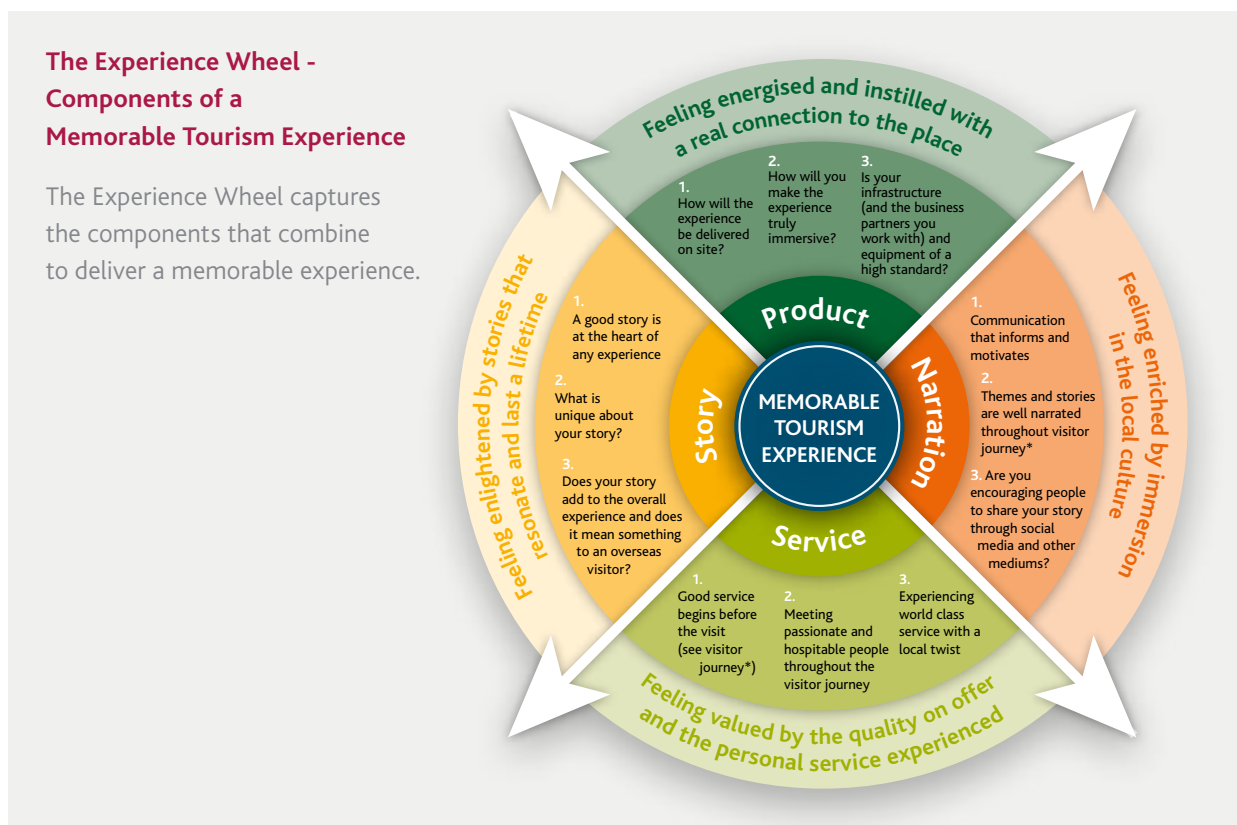
For the business... adding value allows the tourism business to focus on the key motivations of the visitor segment, adjust its offering, diversify into new sales channels, including digital channels and increase sales revenues (upselling/cross selling) and in many cases command better yields.

Guiding principles

Memorable tourism experiences have the following in common:

- **Visitor centric** - focussed on understanding and delivering upon customer needs, motivations and expectations.
- **Authentic** - Irish experiences must be well managed and presented, based on strong themes and stories, but they must also retain their authenticity.

- **Commercial** - tourism experiences must create impact in order to motivate and generate the appropriate visitor interest. Wherever possible, that interest must then be converted into sales, either directly or indirectly.
- **People led** - proactively engage with visitors, adopting the required levels of professionalism, in a personable and friendly manner.
- **World class with a local twist**
- **Sustainable**



- **Product** - one of the core elements is quality product. It's important to note that 'product' includes the main *product offering*; along with the *place* and the environment which is integral to that activity; *supporting products*, such as accommodation, food etc. and *infrastructure* such as transportation, wifi, signage etc.
- **Service** plays a vital role in the visitor experience. It is the people who deliver a high quality, considerate, personal service that can make an experience really memorable.
- **Stories** are the identified reason the product/activity stands out when it is consumed in Ireland rather than anywhere else. Ireland is a land of storytellers like no other... we can really excel in this area! It is the stories that drive a unique Irish experience. Remember, stories are not limited to the spoken word, it's really about ensuring the visitor gets a strong sense of the place and the people.
- **Narration** is about communicating these themes and stories... this is what really delivers on the experience element for the visitor... **a real sense that they have learned or discovered something new and engaged with the people and the place.**

EXPERIENCES

Components of a Memorable Tourism Experience continued

	Culturally Curious	Social Energisers	Great Escapers
Fun, excitement		✓	
Away from it all			✓
Meet the locals	✓	✓	
Enriching			✓
Personal development	✓		
Different, authentic	✓	✓	✓
Participative	✓	✓	✓
	Want to feel connected to the place. Broaden my mind	Want to feel stimulated, excited	Want to feel connected to nature and loved ones. Elated, refreshed

Culturally Curious

IN JOYCE'S FOOTSTEPS

It's a lovely walk from Dún Laoghaire down to Sandycove... past the seawall with the quote (from A Portrait of the Artist as a Young Man) "The first faint noise of gently moving water broke the silence low and faint and whispering"... down to see the waves splashing at the Forty Foot and the "snotgreen sea"... into the Martello Tower to consume the archive, then up the narrowest stairwell and out onto the roof, where you may pause, seeing and hearing that opening scene from Ulysses in your mind's eye and ear, and wondering at "the surrounding country, and the awaking mountains"... From there you could walk on to the Writers' Gallery at Dalkey Heritage Centre, to learn some more... You may want to come back for the Dalkey Book Festival, or for Dún Laoghaire's Mountains to Sea Book Festival... and of course you'll be wanting to come back on 16th June for Bloomsday. You will, won't you? Sure you will!

Social Energisers

13 WAYS TO SHOOT THE (MOUNTAIN) BREEZE

- 1. Not for the fainthearted** - a night time visit to the site of the infamous 18th century Hellfire Club for a haunted history tour. Clearly visible on the Dublin Mountains skyline it's a famous landmark in these parts with a notorious history of drinking and excess... And it was built on the site of a prehistoric tomb, so said to have stirred the wrath of the Devil himself...
- 2. Go on a Mountain Pub crawl...** Join the locals halfway up a Mountain for An Séisiún of Irish song, dance and cráic at the Merry Ploughboy, a pub owned by musicians... sit outside the Blue Light on a still night and see the lights of Dublin City spread out at your feet... join a traditional hooley at Johnnie Fox's, said to be Ireland's highest pub...
- 3. Test your skills on the challenging Ticknock Mountain Bike Trail...** 8km of purpose-built network of forest road climbs and twisty single track... loads of fast descents, ups and downs, tight turns and technical rocky bits, guaranteed to leave you smiling! That and the amazing vistas over city and bay...

Great Escapers

TAKE THE CABLE CAR FOR 'EUROPE'S LAST SUNSET'

It's a dramatic drive along the north edge of the remote Beara Peninsula, with views north and west across the mussel rafts and seal colonies in Kenmare Bay, to Ireland's highest mountains, and the ghostly outline of the Skelligs out at sea. The land ends at the Dursey Sound - where strong tides make travelling by boat hazardous. Yet out to sea is Dursey Island, one of over 100 islands off West Cork - seven of which, including this one, are inhabited. Three families live and farm on this tiny island, and you can take a 10-minute ride - above the waves, on Ireland's only cable car - to explore it on foot. There's a lighthouse, castle ruins, a signal tower, standing stones, and stunning sunsets - known locally as "Europe's last". But do take note of the cable-car etiquette in this corner of the world: the residents - with or without their sheep - take priority over visitors in the queue for a crossing.

Requirements

Does my business offer a true experience?

What experiences can my business deliver on?

What is my product, how and where do I deliver service?

What is my story and how do I communicate it to visitors?

THE DIGITAL CONSUMER JOURNEY

Creating your story and associated content, be it imagery, video or articles is the first crucial step in the journey. The next is to communicate it to the right segment, in the right place at the right time.

Utilising the **Google 5 Stages of Travel Model** the table below advises the key actions to be taken at each stage of the digital journey to communicate your story to the 3 target segments.





THE DIGITAL CONSUMER JOURNEY

CULTURALLY CURIOUS

DREAMING

1. Ensure your website is accessible across all devices e.g. mobile, tablet and desktop
2. Ensure your website is tagged with search friendly terms relevant to Culturally Curious e.g. history tour, cultural holidays, nature & beauty
3. Ensure your website is easy to find on international search engines, e.g. Google.fr, Google.de etc
4. Ensure your website includes high quality imagery e.g. scenic shots, people, cultural or heritage attractions near your business
5. Ensure your website imagery and language appeals to international visitors, not just domestic visitors
6. Submit your business to Google Places
7. Implement an 'email sign-up' feature on your website
8. Establish a social presence (featuring high quality imagery) on Facebook, Twitter, Instagram, YouTube, Pinterest
9. Join and become a part of the Irish Tourism community online e.g. follow and re-tweet content from local cultural businesses via Twitter
10. Implement blog functionality on your website and create blog content that is relevant to the Culturally Curious e.g. Historical walking trails
11. Set-up Google Alerts to monitor mentions of your business
12. Remind previous customers to visit again via email/social
13. Consider translating key information into French and German

PLANNING

1. Write blog post based on the interests of Culturally Curious and promoting your region e.g. History tour of Kilkenny
2. Create illustrated maps and infographics to inspire and educate Culturally Curious on what your region has to offer, e.g. hiking trails in Connemara, key cultural sights etc.
3. Upload high quality imagery, videos and other content from Fáilte Ireland to your site to promote the historical and cultural significance of your region. Personalise with local highlights and references to your business
4. Ensure all content is tagged with search friendly terms e.g. history tour, cultural holidays, nature & beauty
5. Create photo albums for social channels that showcase the historical and cultural hidden gems of your region and older couples enjoying these experiences
6. Experiment with video content using your smartphone camera e.g. 60-90 sec videos capturing the history and culture of your region
7. Create sample itineraries incorporating history, culture and landscape experiences which can be combined to create rich day-long activity plans
8. Share all your content, and content from Fáilte Ireland and trade partners, across your social channels
9. Republish Fáilte Ireland content on your website and social channels. Personalise with reference to your business/region
10. Use paid social media e.g. Facebook ads to build your social community and drive sales of specific services / special offers
11. Monitor review sites e.g. Tripadvisor and respond to comments from Culturally Curious

BOOKING	EXPERIENCING	SHARING
<ol style="list-style-type: none"> 1. Ensure your website is easy to navigate & easy to book (desktop, tablet and mobile) 2. Make your 'Contact Us' details prominent 3. Highlight that your business is accessible to top historical spots & landmarks 4. On social, write posts based on 'what's happening in your area', relevant to Culturally Curious 5. Promote special offers across all channels 6. Utilise paid search (e.g. Google AdWords) to appear for relevant search terms e.g. your business name, local activities - Walking routes in Clare 7. Use retargeting advertising (e.g. Google Remarketing) to push a final sale. Ads target people who have visited your site but did not convert on the first visit 8. Monitor review sites (eg. Tripadvisor) and respond to comments 9. Don't just list your € prices - think about your GB and US visitors. 10. Ensure you have a good system for dealing efficiently with email enquiries 	<ol style="list-style-type: none"> 1. Create sample itineraries incorporating history, culture and landscape experiences which can be combined to create rich day-long activity plans 2. Post relevant local news on website/across social e.g. new exhibition opening 3. Promote your online presence at available offline touch-points (e.g. Poster at front-desk, vehicles, clothing etc.) 4. Capture email data through traditional methods (e.g. Guestbook, business cards, surveys, polls etc.) 5. Respond to questions from Culturally Curious via website/ social channels 	<ol style="list-style-type: none"> 1. Ask your audience to share their experience online, directing them to specific social channels e.g. Tripadvisor, Facebook to post reviews 2. Prompt your audience to use hashtags when sharing photos/ reviews (e.g. #LoveDublin, #BurrenCentre) 3. Incentivise to share experience (e.g. through competition) 4. With permission, capture and promote images/videos of Culturally Curious enjoying experiences at your business 5. If well-known people visit, ask to take their picture and share via social

THE DIGITAL CONSUMER JOURNEY

SOCIAL ENERGISERS

DREAMING

1. Ensure your website is accessible across all devices e.g. mobile, tablet and desktop
2. Ensure your website is tagged with search friendly terms relevant to Social Energisers e.g. Dublin music scene/Mountain biking Dublin
3. Ensure your website is easy to find on international search engines, e.g. Google.fr, Google.de etc
4. Ensure your website imagery and language appeals to international visitors, not just domestic visitors
5. Ensure your website includes high quality contemporary imagery of Dublin e.g. showcasing Social Energisers having fun in Dublin
6. Submit your business to Google Places
7. Implement an 'email sign-up' feature on your website
8. Establish a social presence (featuring high quality, contemporary imagery) on Facebook, Twitter, Instagram, YouTube, Pinterest, Google+
9. Join and become a part of the Irish Tourism community online e.g. follow and re-tweet content from popular Dublin businesses via Twitter (e.g. Le cool/ Dublin Town)
10. Implement blog functionality on your website e.g. Wordpress
11. Set-up Google Alerts to monitor mentions of your business
12. Remind previous customers to visit again via email/social

PLANNING

1. Write blog posts based on the interests of Social Energisers and promoting Dublin e.g. Mixture of urban & outdoor experiences near your business
2. Create illustrated maps and infographics to inspire and educate Social Energisers e.g. Fashion Maps, Top activities in Dublin
3. Upload high quality, contemporary Dublin-based imagery, videos and other content from Fáilte Ireland to your site. Personalise with local highlights and references to your business
4. Ensure all content is tagged with search friendly terms e.g. Dublin music events/ Mountain bike hire Dublin
5. Create photo albums for social channels that showcase Social Energisers experiencing urban and outdoor Dublin experiences
6. Experiment with video content using your smartphone camera e.g. 60-90 sec videos capturing urban and outdoor Dublin activities
7. Create content based on Q&A's with influential people you know e.g. Favourite things to do in the city
8. Create lists of what's hot, cool and current in Dublin. Look at current listings for inspiration
9. Share all your content, and content from Fáilte Ireland and trade partners, across your website social channels
10. Use paid social media e.g. Facebook ads to build your social community and drive sales of specific services/special offers
11. Monitor review sites e.g. Tripadvisor and respond to comments from Social Energisers

BOOKING	EXPERIENCING	SHARING
<ol style="list-style-type: none"> 1. Ensure your website is easy to navigate & easy to book (desktop, tablet and mobile) 2. Make your 'Contact Us' details prominent 3. Highlight that your product is accessible to the local hotspots 4. On social, write posts based on 'what's happening in your area', relevant to Social Energisers 5. Promote special offers across all channels 6. Utilise paid search (e.g. Google AdWords) to appear for relevant search terms e.g. your business name, local activities 7. Use retargeting advertising (e.g. Google Remarketing) to push a final sale. Ads target people who have visited your site but did not convert on the first visit 8. Monitor review sites (e.g. Tripadvisor) and respond to comments 9. List your prices in multi-currency 10. Don't just list your € prices - think about your GB and US visitors. 11. Ensure you have a good system for dealing efficiently with email enquiries 	<ol style="list-style-type: none"> 1. Create sample itineraries incorporating history, culture and landscape experiences which can be combined to create rich day-long activity plans 2. Post relevant local news on website/across social e.g. new exhibition opening 3. Promote your online presence at available offline touch-points (e.g. Poster at front-desk, business cards) 4. Capture email data through traditional methods (e.g. Guestbook/Comments) 5. Respond to questions from Social Energisers via website/ social channels 	<ol style="list-style-type: none"> 1. Ask customers to share their experience and post reviews on Tripadvisor and Facebook 2. Prompt your audience to use hashtags when sharing photos/ reviews (e.g. #LoveDublin #Dublin) 3. Run social competitions to incentivise customers to share experiences 4. With permission, capture and promote images/videos of Social Energisers enjoying experiences at your business 5. If well-known people visit, ask to take their picture and share via social

THE DIGITAL CONSUMER JOURNEY

GREAT ESCAPERS

DREAMING

1. Ensure your website is accessible across all devices e.g. mobile, tablet and desktop
2. Ensure your website is tagged with search friendly terms relevant to Great Escapers e.g. coastal landscape, natural beauty, escape holidays
3. Ensure your website is easy to find on international search engines, e.g. Google.fr, Google.de etc
4. Ensure your website imagery and language appeals to international visitors, not just domestic visitors
5. Ensure your website includes high quality imagery e.g. scenic landscapes, couples & families enjoying outdoor activities
6. Submit your business to Google Places
7. Implement an 'email sign-up' feature on your website
8. Establish a social presence on Facebook, Twitter, Instagram, YouTube, Pinterest
9. Post content relevant to Great Escapers on social channels e.g. photo albums showcasing remote scenic locations of your region
10. Join and become a part of the Irish Tourism community online e.g. follow and re-tweet content from local outdoor activity businesses via Twitter
11. Implement blog functionality on your website e.g. Wordpress etc.
12. Set-up Google Alerts to monitor mentions of your business
13. Remind previous customers to visit again via email/social

PLANNING

1. Write blog posts based on the interests of Great Escapers and promoting your region e.g. Walking Trails in Connemara, Scenic Drives, Top Beaches for Family Picnics, Recommendations on Great Local Restaurants & Authentic Pubs
2. Upload maps to your website, highlighting key scenic attractions and their accessibility to each other e.g. geographic map highlighting top scenic attractions
3. Upload high quality imagery, videos and other content from Fáilte Ireland to your site to promote the scenic beauty of your region. Personalise with local highlights and references to your business.
4. Ensure all content is tagged with terms that are search friendly e.g. regional and interest-based terms such as 'Wild Atlantic Way', 'nature', 'coastal landscapes'
5. Create photo albums for social channels that showcase stunning landscapes and natural phenomena from your region and couples/families having quality time together
6. Experiment with video content using your smartphone camera - e.g. 60-90 sec videos capturing the remoteness of your region and key landmarks
7. Create Top 10 Lists for regional outdoor activities and activities for couples/families to do together
8. Share all your content and content from Fáilte Ireland and trade partners, across your website and social channels
9. Use paid social media e.g. Facebook ads to build your social community and drive sales of specific services / special offers
10. Monitor review sites (e.g. Tripadvisor) and respond to comments from Great Escapers

BOOKING	EXPERIENCING	SHARING
<ol style="list-style-type: none"> 1. Ensure your website is easy to navigate & easy to book (desktop, tablet and mobile) 2. Make your 'Contact Us' details prominent 3. Highlight that your business is in an area suited to Great Escapers, i.e. in an area of natural beauty, along the coast, for example the Wild Atlantic Way. 4. On social, write posts based on hidden gems and get away locations in your area. 5. Promote special offers across all channels 6. Utilise paid search (e.g. Google AdWords) to appear for relevant search terms e.g. your business name and local activities. 7. Use retargeting advertising (e.g. Google Remarketing) to push a final sale. Ads target people who have visited your site but did not convert on the first visit 8. Monitor review sites (e.g. Tripadvisor) and respond to comments 9. List your prices in multi-currency 10. Don't just list your € prices - think about your GB and US visitors. 11. Ensure you have a good system for dealing efficiently with email enquiries 	<ol style="list-style-type: none"> 1. Post and share relevant local news e.g. local trips, classes, activities etc. 2. Promote your online presence at available offline touch-points e.g. poster at front-desk 3. Capture email data through traditional methods e.g. Guestbook, questionnaire, polls, etc. 4. Respond to questions from Great Escapers via social channels 	<ol style="list-style-type: none"> 1. Ask customers to share their experience and post reviews on Tripadvisor and Facebook 2. Prompt your audience to use hashtags when sharing photos / reviews e.g. #WildAtlanticWay 3. Incentivise Great Escapers to share experiences e.g. run a photography competition for most scenic picture of your region 4. With permission, capture and promote images/videos of Great Escapers enjoying experiences at your business 5. If well-known people visit, ask to take their picture and share via social

DIRECT & INDIRECT SALES CHANNELS

Knowing where your potential customers search for information and being visible in those places/channels is key to driving sales.

2 main channels:

1. **Direct** - both online and offline: primarily your website, but also phone and walk-in business
2. **Indirect** - both online and offline: online tour operators (OTAs including comparator sites), tour operators, travel agents, group organisers and other travel websites.



Worth thinking about...

- 60% of all hotels bookings are now done digitally.
- Across all segments, the majority of travel purchases are influenced by digital channels (websites, social media, peer reviews, smartphone or tablet apps) even if the final purchase isn't made online.
- Tour operators and OTAs are often consulted during research and the booking made through them or directly with the tourism business - these intermediaries can be a shop window that influences direct sales.
- An average holidaymaker will visit up to 38 sites before making a purchase.
- The segment research shows that Culturally Curious and Great Escapers tend to avoid all-inclusive packages while Social Energisers like them - especially using OTAs and dynamic packaging websites where they build and purchase their own package combination of flight, accommodation, car hire, activities etc. on a single website.
- OTAs are an important source of information both for inspiration and planning.
- The percentage of holidaymakers who watch online travel videos is increasing year on year. Videos (from hotels, experts, 'people like me', friends and family) are effective.
- Holidaymakers not only watch online travel videos, they create and share them too - this can drive referral sales.
- More and more people are using smartphones or tablets for travel related information while on a trip so there are opportunities for location-specific advertising to peoples' smartphones/tablets when they're in your area.
- Holidaymakers are wary of the roaming charges that apply while in another country so consider the use of apps which avoid this issue.

Those seeking to book hotels are twice as likely to search for travel images

Internet is becoming local and personal

Requirements

What's the current mix of direct vs indirect sales in my business?

Is this mix appropriate? If not, what measures must I initiate to redress the balance?

Does my website reflect all that a holidaymaker can see and do?

DIRECT & INDIRECT SALES CHANNELS

Online travel agents (OTAs)


Online Travel Agents (OTAs) are basically online versions of the traditional travel agent or tour operator. They sell travel products to customers online and act as a bridge between suppliers (hotels, airlines, car hire companies, visitor attractions etc.) and consumers.

Hotel rooms are the main focus of the majority of most OTA websites, while some also offer dynamic packaging that allows the consumer to purchase their hotel, flight and car hire in one transaction. OTAs are now selling 60% of all rooms in Ireland.

Well known OTAs include Expedia, Booking.com, HostelWorld, Orbitz, Travelocity, Priceline and LastMinute.com. Expedia owns TripAdvisor, hotels.com, venere.com and Hotwire. Some OTAs such as Golreland and Irelandhotels.com only sell Irish accommodation.

OTAs are the fastest growing distribution channel for travel products and can be very effective for independent hotels, B&Bs and guesthouses who will not typically be known internationally and who might not have the expertise or marketing budgets to directly target international travellers. A study by Fáilte Ireland showed that 82% of Irish hotels say that OTAs give them access to international markets.

Working with OTAs can be a relatively low maintenance way of reaching new and international customers. Fáilte Ireland research indicates that 86% of Irish hotels spend less than 5 hours per week updating their OTA rates. Many of these updates are done manually, while some use a Channel Manager such as Rate Tiger or Easy Yield.



Reaching visitors
with timely and
personalised offers

The OTA billboard effect

One of the most powerful benefits of working with an OTA is the 'billboard effect'. This is where a hotel benefits from the branding and visibility of being on an OTA's website, but the customer books directly with the hotel, saving the hotel the commission they would pay the OTA if the booking came from them. This was proved in a 2011 Cornell University study which showed that of the 1,726 people who made reservations on the Intercontinental Hotels website, 75% had visited an OTA before booking, 83% had used a search engine and 66% had done both.

This proves the importance of your own website, a direct channel which should generate higher yields than any other distribution channel. Make sure you maximise all opportunities to convert a 'looker' into a 'booker', i.e. someone who might find out about your property on a 3rd party website, but check you out on your own site before making a decision and booking.

Commissions are often the bone of contention between hotels and OTAs and rates typically range between 10% and 30%. These commissions come off the hotel's 'best available rate', and many OTAs insist on rate parity with the hotel's own website. On the majority of OTA websites, hotels can only sell room only and B&B rates. Before doing business with OTAs be very clear about contractual arrangements and review the business small print in detail.



Opaque deals on OTAs

A recent trend has developed whereby some OTAs offer an opaque or 'top secret' booking. This is where the name of the property is not revealed to the customer until they have made the booking. OTAs who offer this include Priceline, Lastminute.com and Hotwire and it is of more relevance to city centre hotels than others.

Dynamic packaging

Dynamic packaging is a package holiday that enables consumers to build and purchase their own package of flights, accommodation, car rental, activities etc on a single website.

Other channels and GDS

In recent years, in addition to buying a holiday from a tour operator or travel agent, the tourist has an increasing choice - tourism distribution channels have expanded to include supermarkets, reader offers, special interest groups etc.

Site comparators (sometimes called metasearch)

These are sites which potential visitors use as part of their research, and include Trivago, TripAdvisor, Hipmunk and Kayak. Price comparison is not the only function of these sites, they provide everything in one place, search, maps, photos, ratings, availability and prices. They provide peace of mind for users and accurate tailored information for the visitor. In 2013 60% of holidaymakers compared prices before buying, and comparator sites drive up to 13% increase in traffic (Source: tnooz 2013). In Europe percentage costs of generated direct bookings from comparator sites are 15-20% cheaper than OTAs (Source: Mirai 2013). Trivago was the number 1 trending business for international hotel groups on Google in Ireland in 2013 (Source: Irish Times Dec. 2013).



OTAs are not just for hotels

Expedia and Lastminute.com don't just work with accommodation providers; they also feature attractions and transport providers.

DIRECT & INDIRECT SALES CHANNELS

Tour Operators

The role of tour operators has changed dramatically in recent years. Now just 20% of international holidaymakers come to Ireland on a package (flight + one other ground element). Despite the relatively low percentages, tour operators are still a key part of the mix for most Irish tourism businesses.

All inclusive packages to Ireland:

- 29% of US holidaymakers
- 24% of German holidaymakers
- 21% of French holidaymakers
- 6% of GB holidaymakers

Top tour operators			
GB	USA	Germany	France
Imagine Ireland	CIE Tours	DERTour	Vacance Transat
Hogan Cottages	Brendan Tours	CTS Gruppen	Brittany Ferries
Superbreaks	Sceptre Tours	Highlander Reisen	Gaeland Ashling
Action Tours		Troll Tours	Celtic Tours
National Holidays		Wholesalers: Service Reisen, Behringer Touristik and Frumm Touristik	
Albatross			

Please see www.tourismireland.com for full list of overseas operators programming Ireland.

The ITOA

The Incoming Tour Operators Association (ITOA) is the representative association of Ireland's inbound tour operators. Members design programmes and itineraries for escorted tour groups, individual holidaymakers and business tourists including incentive, corporate meetings and conferences. The ITOA operates two workshops in Ireland each March - one east coast, one west coast. These are a valuable opportunity for tourism businesses to sell to incoming tour operators. See www.itoa-ireland.com

Rate parity and price transparency

All product providers should aim to maintain rate parity across all channels so as to build trust from online customers. Customers are internet savvy - they can easily see what prices you charge in different distribution channels and your reputation will be damaged if they pay a higher price depending on where they buy your product. Customers like to feel that the price they booked is the best available price, particularly if they book from you directly.

When working with tour operators you should have a recommended retail price so that there is pricing transparency across all your distribution channels.

Winning on the internet is a science not an art!

Developing a Channel Strategy - things to consider

Some points to bear in mind when setting a distribution strategy for your business.

	YES	NO
1. Do I have a multichannel strategy so as not to be over-reliant on any one channel?	<input type="checkbox"/>	<input type="checkbox"/>
2. Am I managing and marketing my own website to maximise yield but not to the exclusion of other distribution channels?	<input type="checkbox"/>	<input type="checkbox"/>
3. Have I considered the important role that tour operators, DMCs, travel agents etc can play in my business?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do I have a pricing strategy in place for all revenue channels?	<input type="checkbox"/>	<input type="checkbox"/>
5. Is my channel strategy market specific and a good fit for my product and target segments?	<input type="checkbox"/>	<input type="checkbox"/>
6. Have I set targets for all my revenue channels?	<input type="checkbox"/>	<input type="checkbox"/>
7. Have I maximised my business relationship with those OTAs who fit best with my business?	<input type="checkbox"/>	<input type="checkbox"/>
8. How easy is it for customers to buy from my own website?	<input type="checkbox"/>	<input type="checkbox"/>
9. Have I considered the cost of sales when creating my channel strategy? (OTA commissions, etc)?	<input type="checkbox"/>	<input type="checkbox"/>
10. Who in my business will manage my sales and revenue strategy on a day to day basis?	<input type="checkbox"/>	<input type="checkbox"/>
11. Am I reviewing and managing my review rating, conversion rate, availability, number of photos and quality of descriptions on OTA sites, and my business ranking?	<input type="checkbox"/>	<input type="checkbox"/>
12. Should I consider a channel manager such as Rate Tiger or Easy Yield?	<input type="checkbox"/>	<input type="checkbox"/>
13. Have I considered rate parity across all my revenue distribution channels so that my pricing structure is transparent to consumers?	<input type="checkbox"/>	<input type="checkbox"/>

Content and advertising strategies need to span all devices or risk missing out on 1/4 of prospective customers

Why access is so important

Good air and ferry access are vital for international tourism. No matter where in Ireland your business is located, it's important to let international tourists know how accessible both Ireland and your business are.

The popularity of short breaks underlines the need to communicate access information. For example, the new Munich and Berlin flights to Shannon present real opportunities for businesses in the southwest to increase sales from Germany.

Air access accounts for 80% of GB & French visitors, 75% of German visitors and 99% of US visitors. Arrival by ferry accounts for the remaining 20% from GB and France, and 25% from Germany (via France or GB).

For summer 2014, the number of airline seats to Ireland will increase by 5% over 2013 levels. Ferry access will see new ferry routes as well as additional capacity on established routes.



It's important to sell Ireland as a close BUT also very exotic place.

For GB, Germany and France, Ireland needs to be seen as easy to get to but different enough to differentiate it from competing destinations.



BY AIR FROM GB

DEPART	ARRIVE	AIRLINE
ABERDEEN	Dublin	Aer Lingus
	Knock	Flybe
	Belfast City	Flybe
BIRMINGHAM	Knock	Flybe
	Dublin	Aer Lingus Regional; Ryanair
	Shannon	Aer Lingus Regional
	Cork	Aer Lingus Regional
	Waterford	Flybe
	Belfast City	Flybe
BLACKPOOL	Belfast International	easyJet
	Belfast City	Citywing
	Dublin	Aer Lingus Regional
BOURNEMOUTH	Dublin	Aer Lingus Regional
BRISTOL	Cork	Aer Lingus Regional
	Dublin	Aer Lingus Regional; Ryanair
	Shannon	Aer Lingus Regional
	Belfast International	easyJet
CARDIFF	Knock	Ryanair
	Dublin	Aer Lingus Regional
	Belfast City	Flybe
DONCASTER SHEFFIELD	Belfast City	Links Air
EAST MIDLANDS	Knock	Ryanair
	Belfast City	Flybe
	Cork	Ryanair
	Dublin	Ryanair
EDINBURGH	Belfast City	Flybe
	Dublin	Aer Lingus Regional; Ryanair; Flybe
	Shannon	Aer Lingus Regional
	Cork	Aer Lingus Regional
	Knock	Ryanair
	Belfast International	easyJet
	Belfast City	Flybe

DEPART	ARRIVE	AIRLINE
EXETER	Belfast City	Flybe
	Dublin	Flybe
GLASGOW PRESTWICK	Knock	Ryanair
	Dublin	Ryanair
	City of Derry	Ryanair
GLASGOW INTERNATIONAL	Dublin	Aer Lingus Regional
	Cork	Aer Lingus Regional
	Donegal	Flybe
	Belfast International	easyJet
INVERNESS	Belfast City	Flybe
	Dublin	Aer Lingus Regional
ISLE OF MAN	Belfast City	CityWing
	Dublin	Aer Lingus Regional; Flybe
JERSEY	Belfast International	easyJet
	Belfast City	Flybe
	Cork	Aer Lingus Regional
	Dublin	Ryanair
LEEDS BRADFORD	Belfast City	Flybe
	Knock	Ryanair
LIVERPOOL	Dublin	Ryanair
	Shannon	Ryanair
	Cork	Ryanair
	City of Derry	Ryanair
	Belfast International	easyJet
	Dublin	CityJet
LONDON GATWICK	Knock	Aer Lingus
	Dublin	Aer Lingus; Ryanair
	Cork	Ryanair
	Shannon	Ryanair
	Belfast International	easyJet
	Belfast City	Aer Lingus; Flybe
LONDON HEATHROW	Dublin	Aer Lingus
	Shannon	Aer Lingus
	Cork	Aer Lingus
	Dublin	British Airways
	Belfast City	British Airways
LONDON LUTON	Knock	Ryanair
	Dublin	Ryanair
	Kerry	Ryanair
	Belfast International	easyJet
LONDON SOUTHEND	Dublin	Aer Lingus Regional
LONDON STANSTED	Knock	Ryanair
	Cork	Ryanair
	Dublin	Ryanair
	Kerry	Ryanair
	Shannon	Ryanair
	Belfast International	easyJet
	Knock	Flybe
MANCHESTER	Dublin	Aer Lingus Regional; Ryanair; British Airways
	Cork	Aer Lingus Regional
	Shannon	Aer Lingus Regional
	Waterford	Flybe
	Belfast International	easyJet
	Belfast City	Flybe
	Dublin	Aer Lingus Regional; Ryanair
NEWCASTLE	Cork	Aer Lingus Regional
	Belfast International	easyJet
	Belfast City	Flybe
SOUTHAMPTON	Dublin	Flybe
	Belfast City	Flybe

ACCESS



BY SEA FROM GB

DEPART	ARRIVE	CARRIER
CAIRNRYAN	Belfast	Stena Line
	Larne	P&O Ferries
DOUGLAS (ISLE OF MAN)	Dublin	Isle of Man Ferries
	Belfast	Isle of Man Ferries
FISHGUARD	Rosslare	Stena Line
HOLYHEAD	Dublin	Irish Ferries
	Dun Laoghaire	Stena Line
	Dublin Port	Stena Line
LIVERPOOL	Dublin	P&O Ferries
	Belfast	Stena Line
PEMBROKE	Rosslare	Irish Ferries
TROON	Larne	P&O Ferries



BY AIR FROM USA

DEPART	ARRIVE	AIRLINE
ATLANTA	Dublin	Delta Airlines
BOSTON	Dublin	Aer Lingus
	Shannon	Aer Lingus
CHICAGO	Shannon	United Airlines
	Dublin	Aer Lingus
DENVER/BOULDER	Shannon	US Airways
	Shannon	Jet Blue & Aer Lingus
	Dublin	Jet Blue & Aer Lingus
LOS ANGELES	Shannon	Jet Blue & Aer Lingus
	Dublin	Jet Blue & Aer Lingus
NEW YORK		
JFK	Dublin	Aer Lingus
JFK	Shannon	Aer Lingus
JFK	Dublin	American Airlines
Newark	Dublin	American Airlines
Newark	Dublin	United Airlines
Newark	Shannon	United Airlines
Newark	Belfast International	United Airlines
JFK	Dublin	United Airlines
Newark	Dublin	Lufthansa
Newark	Shannon	Lufthansa
JFK	Dublin	Delta Airlines
ORLANDO	Dublin	Aer Lingus
PHILADELPHIA	Dublin	US Airways
SAN FRANCISCO	Dublin	Aer Lingus; American Airlines
	Dublin	US Airways & Aer Lingus
	Shannon	Air Canada
SEATTLE	Dublin	Jet Blue & Aer Lingus
WASHINGTON DC		
Dulles	Shannon	Jet Blue & Aer Lingus
Dulles	Dublin	Aer Lingus; United Airlines
Dulles	Dublin	Jet Blue & Aer Lingus



BY AIR FROM GERMANY

DEPART	ARRIVE	AIRLINE
BERLIN (SCHONEFELD)	Dublin	Aer Lingus; Ryanair
	Shannon	Ryanair
BREMEN	Dublin	Ryanair
COLOGNE/BONN	Knock	Lufthansa; Germanwings
DUSSELDORF	Dublin	Aer Lingus; Lufthansa; Germanwings
FRANKFURT	Dublin	Aer Lingus; Lufthansa
FRANKFURT (HAHN)	Dublin	Ryanair
	Kerry	Ryanair
HAMBURG	Dublin	Aer Lingus
HANOVER	Dublin	Aer Lingus
MEMMINGEN (MUNICH WEST)	Dublin	Ryanair
	Shannon	Ryanair
MUNICH	Dublin	Aer Lingus; Lufthansa
	Cork	Aer Lingus
STUTTGART	Dublin	Aer Lingus



BY AIR FROM FRANCE

DEPART	ARRIVE	AIRLINE
BERGERAC	Dublin	Flybe
BIARRITZ	Dublin	Ryanair
BORDEAUX	Dublin	Aer Lingus
	Belfast International	easyJet
BREST	Dublin	Air France; Flybe
CARCASSONNE	Dublin	Ryanair
	Cork	Ryanair
CLERMONT-FERRAND	Dublin	Flybe
GRENOBLE	Dublin	Ryanair
LA ROCHELLE	Dublin	Ryanair
LYON	Dublin	Aer Lingus
MARSEILLE	Dublin	Aer Lingus; Ryanair
NANTES	Dublin	Ryanair
NICE	Cork	Aer Lingus
	Dublin	Aer Lingus; Ryanair
	Shannon	Ryanair
PARIS (CHARLES DE GAULLES)	Cork	Aer Lingus
	Dublin	Aer Lingus
	Dublin	Air France
	Belfast International	easyJet
PARIS (BEAUVAIS)	Dublin	Ryanair
	Shannon	Ryanair
POITIERS	Shannon	Ryanair
PERPIGNAN	Dublin	Aer Lingus
RENNES	Dublin	Aer Lingus Regional
	Cork	Aer Lingus Regional
RODEZ	Dublin	Ryanair
TOULOUSE	Dublin	Aer Lingus
TOURS	Dublin	Ryanair



BY SEA FROM FRANCE

DEPART	ARRIVE	CARRIER
CHERBOURG	Rosslare	Irish Ferries
	Dublin	Irish Ferries
	Rosslare	Stena Line
ROSCOFF	Rosslare	Irish Ferries
	Cork	Brittany Ferries
ST NAZAIRE	Rosslare	LD Lines

Requirements

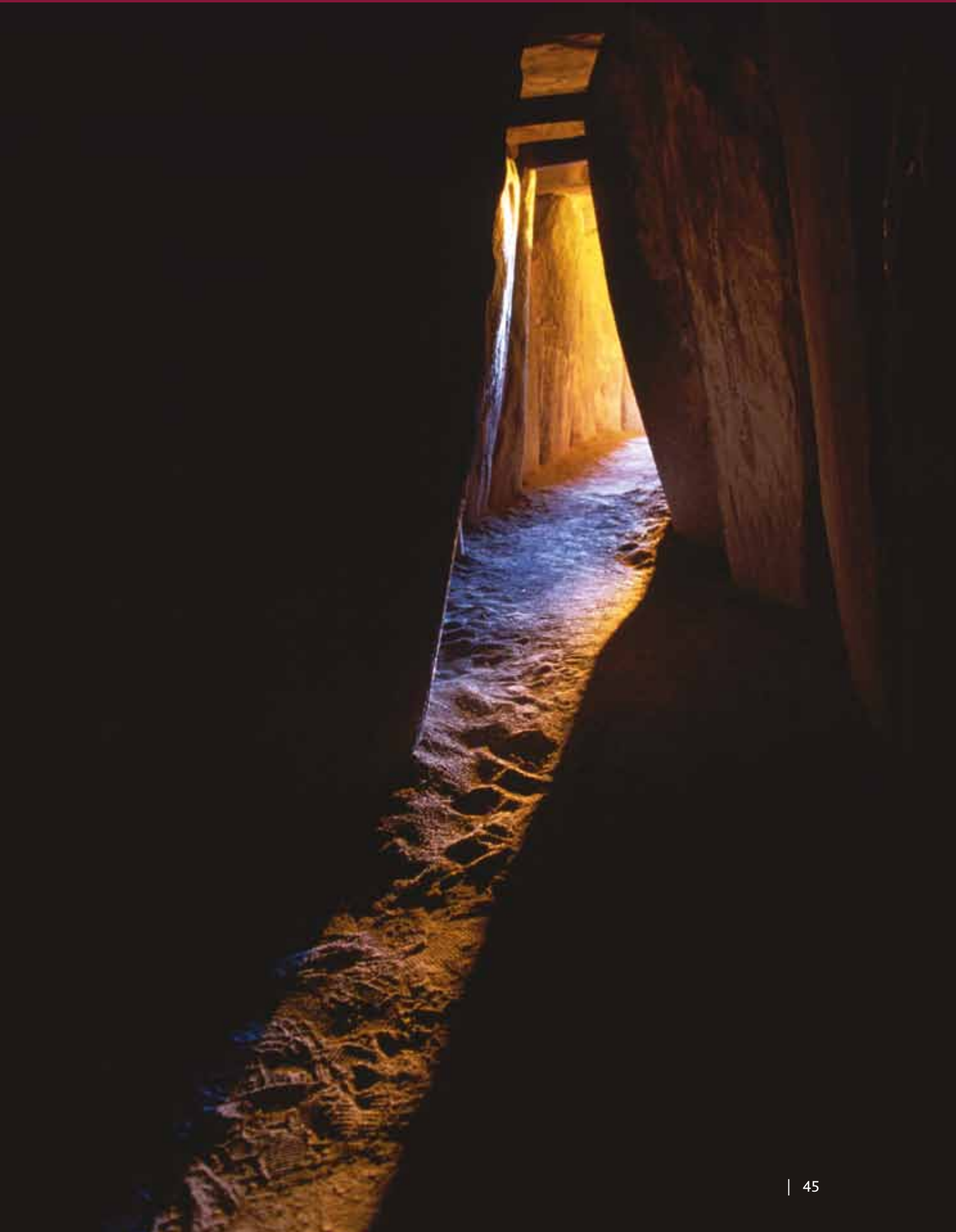
List air and ferry routes to Dublin and your local airport/port on your website

Provide travel times and directions from airports and ferry ports to your business e.g. 30 minutes from Knock Airport, 2 hours from Dublin Airport

Create links from your website to carrier websites

Access information is subject to change so check regularly for updates

Sign up for Google Places to feature on Google Maps - makes it easier for people to find you



4 MAIN OVERSEAS MARKETS

Introduction

Ireland's four main overseas markets deliver 70% of visitors and revenue. So, when allocating resources it makes sense to focus resources where there is best potential.

Questions	Great Britain
When do they visit Ireland?	Visit all year 31% Jan-Apr 23% May-June 22% July-Aug 9% Sept 15% Oct-Dec
Where do they go in Ireland?	Majority spend their time in one destination Short-breaks, less regional touring 53% Dublin 28% Southwest 19% West 11% Midwest
How long do they stay in Ireland?	Average 5 nights Average annual leave 28 days
What accommodation do they use when in Ireland?	33% hotels 13% rented 9% guesthouses/B&Bs 26% friends and relatives
Where are they from?	21% South East 15% London 11% South West 11% North West 10% West Midlands 8% Scotland 8% Wales

United States	Germany	France
<p>62% visit outside of July and August</p> <p>17% Jan-Apr 29% May-June 29% July-Aug 11% Sept 13% Oct-Dec</p>	<p>73% visit outside of July and August</p> <p>23% Jan-Apr 31% May-June 27% Jul-Aug 8% Sept 12% Oct-Dec</p>	<p>64% visit outside of July and August</p> <p>22% Jan-Apr 26% May-June 36% July-Aug 6% Sept 9% Oct-Dec</p>
<p>Most will visit more than one region</p> <p>Dublin is on the majority of itineraries followed by Western seaboard and Southwest</p> <p>80% Dublin 48% Southwest 35% West 32% Midwest</p>	<p>41% like to tour around 24% visit Dublin only</p> <p>65% Dublin 50% Southwest 33% West</p>	<p>Most will visit more than one region</p> <p>6% Dublin 50% West 43% Southwest</p>
<p>Average 6.8 nights (42% stay 6-8 nights)</p> <p>Average annual leave 12 days</p>	<p>Average 8.3 nights</p> <p>Average annual leave 29 days</p>	<p>Average 8.9 nights</p> <p>13% short breaks (1-3 nights)</p> <p>Average annual leave 7.5 weeks, min. 5 weeks</p>
<p>50% hotels 25% B&Bs and guesthouses 7% rented 8% hostels</p>	<p>34% hotels 25% Guesthouses/B&Bs 10% rented</p>	<p>23% guesthouses and B&Bs 20% hotels 13% rented</p>
<p>New York, California, Massachusetts, Florida and Illinois</p>	<p>Bavaria Baden-Wurtemberg, Nord Rhein/ Westphalia Rheinland-Palatinate and Hessen</p>	<p>33% from Paris 20% from Western France 14% South East 12% South West 11% Mediterranean 6% East 3% North</p>

CONTINUED OVERLEAF

4 MAIN OVERSEAS MARKETS

continued

Questions	Great Britain
What age are they?	A greater portion over 35s 48% are over 45 Mostly couples and a quarter in other adult groups Less child or family focussed
How do they get here?	8 out of 10 air 2 out of 10 hire a car 2 out of 10 bring their car
Have they visited Ireland before?	59% previously visited Visiting friends and relations (VFR) is big from the GB market
Will they return to Ireland?	76% will return
Is the language important to them?	N/A

United States	Germany	France
<p>Slightly older than European visitors, 25% are over 55</p> <p>44% are over 45</p> <p>Almost half visit as part of a couple</p>	<p>22% are under 24 24% are 25-34 16% are 35-44 38% are over 45</p> <p>39% couple 12% family 23% with other adults</p>	<p>Younger than other markets; just 27% are over 45</p> <p>36% couple 25% family (more than twice the number of Germans who travel with family) 19% with other adults</p>
<p>99% air 46% hire a car</p>	<p>75% air 25% by sea 32% hire a car 23% bring their car</p>	<p>80% air 20% sea 18% bring their car 37% hire a car</p>
<p>75% are on first visit</p>	<p>65% are on first visit 25% are repeat visitors</p>	<p>65% are on first visit</p>
<p>50% will return</p>	<p>54% will return</p>	<p>50% will return</p>
<p>N/A</p>	<p>Very important if attending consumer shows in Germany</p> <p>Many like to do their holiday research and planning in their own language, so knowledge of the language is a definite advantage</p>	<p>Being able to speak French is important both for consumer and trade engagement</p>

4 MAIN OVERSEAS MARKETS

A snapshot of the GB market



Size of the segments

- 4.8m Social Energisers
- 4.7m Culturally Curious
- 5.5m Great Escapers
- 100% of GB Social Energisers who have been to Ireland rate it 8 out of 10
- More than half of Culturally Curious visitors were happy with the value provided

Potential of the market for Ireland

- Ireland's largest source market; 2.9m visitors in 2013, an increase of 5.6% over 2012
- 42% of all our overseas visitors are from GB
- 36% of all our overseas holidaymakers are from GB
- 64% of GB outbound market are interested in visiting Ireland in the future

Top 10 destinations for GB traveller

1. Spain
2. France
3. US
4. Greece
5. Italy
6. Portugal
7. Turkey
8. Netherlands
9. Ireland
10. Belgium

A snapshot of the US market



Size of the segments

- 12.9m Culturally Curious
- 36.7m Great Escapers
- 26.4m Social Energisers

Size and potential of the market for Ireland

- Our second most important market; it grew by 14.5% in 2013 to 1.036m visitors
- US visitors are our highest spenders and our most affluent visitors
- They stay longer and travel around more

A snapshot of the German market



Size of the segments

- 16.6m Great Escapers
- 7.6m Culturally Curious
- 7.6m Social Energisers

Size and potential of the market for Ireland

- The world's second largest outbound travel market (after China); 53% take a holiday abroad
- Ireland gets 1% of German outbound market
- Ireland's 3rd largest source market; 483,000 visitors in 2013, up 7.7% over 2012
- Activity is important for many; 28% take part in hiking/walking and Germany is the largest market for overseas anglers, which accounts for 15% of all overseas angling visits
- 68% of outbound market have expressed an interest in visiting Ireland in the future

A snapshot of the French market



Size of the segments

- 8.3m Great Escapers
- 6.7m Culturally Curious
- 6.4m Social Energisers

Size and potential of the market for Ireland

- Ireland's 4th largest source market; 434,000 visitors in 2013, up by 9.4% on 2012
- 60% of outbound market expressed an interest in visiting Ireland in the future
- French people take an average 4 holidays per year, 1.5 of these are abroad holidays

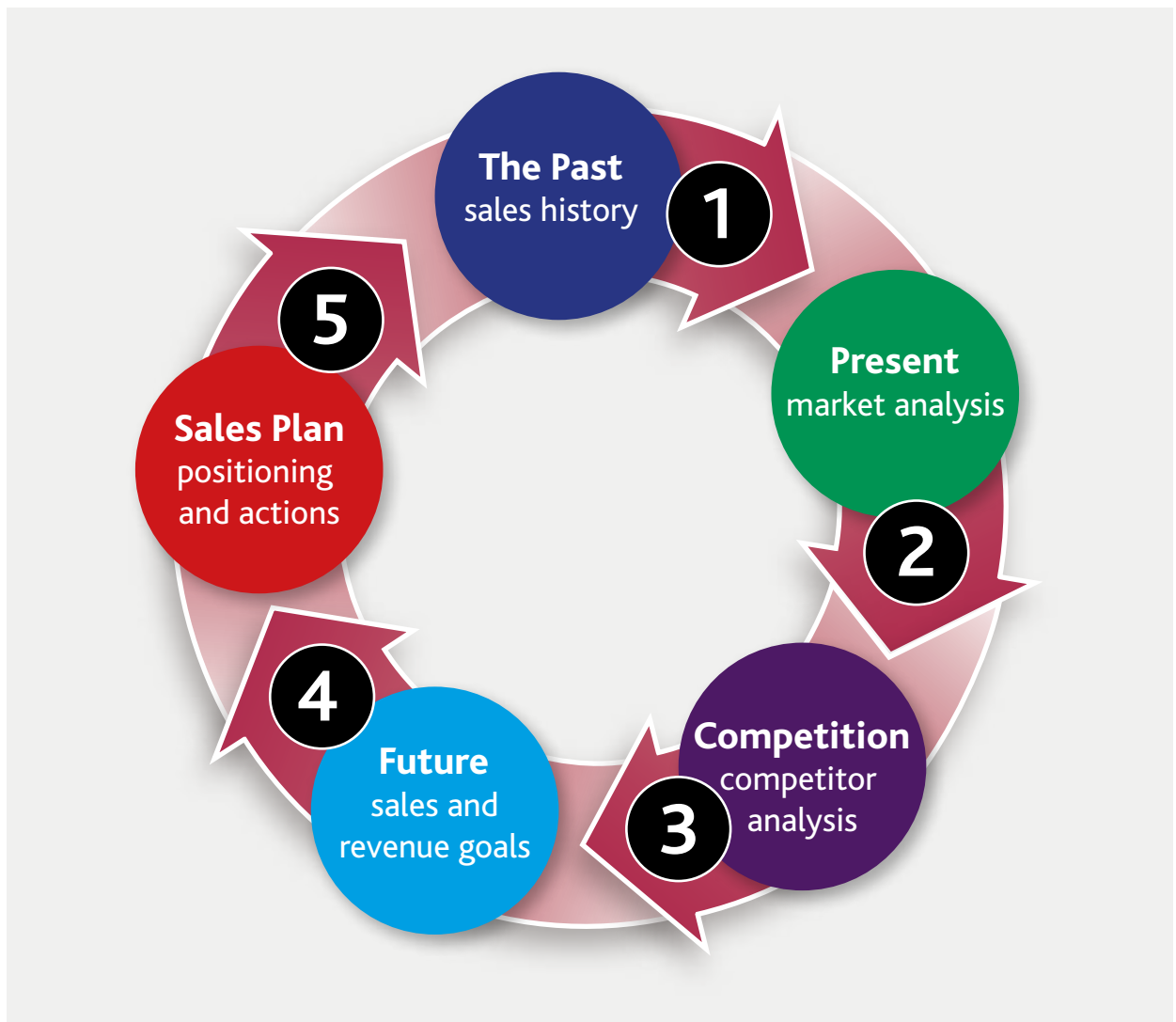
France is the world's 5th most important outbound market by revenue; 24.6m outbound trips, with €29 billion spend

DEVELOPING YOUR SALES PLAN

The 5 steps to developing your sales plan

The planning and time you put into developing your sales plan is as important as the final written plan. Work through the 5 steps and you'll have a well thought out, focussed plan to drive sales. Each step is important - from looking at past sales performance to evaluating your business against the competition to allocating resources and measuring effectiveness.

1. The **past** - sales history
2. The **present** - market analysis
3. The **competition** - competitor analysis
4. The **future** - sales and revenue goals
5. The **sales plan** - positioning and actions



1. The past - sales history	
1.1 Revenue	Use internal systems and reports to analyse revenue - rooms, activities, food, tickets, etc.
1.2 Sales mix	Which areas of the business perform best? Does the 80:20 rule apply? If you are too reliant on a small number of customers it can have a big impact if they contract.
1.3 Key performance indicators	Work out <ul style="list-style-type: none"> • average spend per customer • average room rate (ARR) • occupancy levels
1.4 Business mix breakdown	Which areas of the business mix generate the most and least revenue? <ul style="list-style-type: none"> • Overseas leisure markets: GB, US, Germany, France • Domestic leisure market
1.5 Cost of Sales	Do you understand the true cost of sale for? <p>Direct bookings:</p> <ul style="list-style-type: none"> • What costs does your business incur, for example costs for managing and updating your website including design, hosting costs, commission to booking sites, managing email, channel manager, PPC and SEO? <p>OTAs:</p> <ul style="list-style-type: none"> • Do you know your commission rates, channel manager and staff costs? <p>Tour Operators:</p> <ul style="list-style-type: none"> • Do you know your commission rates, costs of travel to market to attend in-market activity, promotional material, etc?
1.6 Seasonal nature of revenue	Determine weak and strong periods: <ul style="list-style-type: none"> • Are there trends? • What is forecast?
1.7 New/renewal/existing business	New/repeat/existing business: <ul style="list-style-type: none"> • What new business is there and what is it worth? • Who are the business' top 100 customers? • What is the retention/renewal rate?

DEVELOPING YOUR SALES PLAN

2. The present - market analysis

2.1 Customer groups

Who are my customers?

- Overseas or domestic?
- Culturally Curious, Great Escapers or Social Energisers?
- Where are they from?

2.2 Market size and share

Is the market growing? Analyse industry trends.
What share of the market am I getting?

2.3 Changes and trends

What trends can be foreseen?

- Where is the business now against where it was?
- What's happening to my customers that will influence sales?
- What's happening in the market that will influence sales?

3. The competition - competitor analysis

3.1 Competitive advantages

Competition:

- What makes my business different?
- How do competitors' offerings and rates compare with my business?
- Do I have a competitive edge?

3.2 SWOT

Strength: What does your business do well, that is beyond what your competition does?

Weakness: What does your competition do better than you?

Opportunity: Something outside your business that can be turned into a strength e.g. new infrastructure, a change in consumer behaviour

Threat: An external influence that poses a threat to your business beyond your control e.g. reduced air access from a key market

4. The future - sales and revenue goals

4.1 Revenue goals

Set sales targets by segment and by market:

- overseas leisure business
- domestic leisure business

4.2 New/repeat/existing

It's cheaper to sell more to existing customers than acquire new ones:

- My top customers and type of business they generate
- New business from new customers
- New business from existing customers



5. The sales plan - actions

5.1 Acquiring new business

How will new business be acquired?

- Digital sales strategy and own website
- Tour operators
- In-Ireland events and trade shows
- Online presence with OTAs

5.2 Growing existing business

Review what you have done in the past - learn from mistakes and repeat what worked well

5.3 Sales Action Plan Template

Set out all your sales activities by:

- Month
- Detail of the sales action
- Target
- Resources (budget and staff)
- KPIs
- Responsibility

DEVELOPING YOUR SALES PLAN

Short term actions that will drive sales

1. A **mobile website** is probably one of the most important tasks on your action plan. Keep content updated, relevant and of value to your target segments.
2. **Email newsletters** are more effective in driving sales than most social media platforms. A segmented database, a clever subject line, a short newsletter (1 or 2 key messages) and a strong call to action that directs people to your website is great for driving repeat and referral business. Remember the influence of recommendations from friends and family! Stay in touch with happy customers and they will become your sales team.
3. An attractive **video** on your website and other digital platforms is a big advantage. Video is extremely effective for all segments.
4. Good **imagery** is vital. And, it gets over the language barrier without any need for translation. Both photographs and video can powerfully communicate unique and authentic experiences that make the visitor want to buy.
5. Pricing on your website and your booking engine should be **multi currency**.
6. **Location-based communications** - capitalise on the fact that many of your customers use their smart phone or tablet as sources of information while on holiday.
7. **OTAs** - don't get hung up on commission rates - they can be an important shop window and open up markets you might not reach on your own. Manage your presence on OTAs - don't be over reliant but don't ignore them. Also consider having a presence on an OTA comparator site, e.g. Trivago.
8. **Languages** are important - particularly for consumer engagement. Translate key pages that are of interest to an overseas visitor into their language.
9. Use **Google Places** - it will make your website and your business easier to find.
10. **International SEO** will make it easier for international visitors to find your website.
11. **Google Adwords** can be a cost effective way of delivering visitors to your website. Once they get there, make sure the site hooks them in and drives them towards a sale.
12. **Use Facebook and Twitter and other current social media** - especially for Social Engagers. Social media tends to be less of a generator of sales than search, but it's preferred by Social Engagers.
13. Engage with **TripAdvisor** and other relevant online review sites. Include customer reviews on your own website and be sure to highlight any accolades for example food awards.
14. **Guidebooks** can influence at inspiration and purchase stage - are you listed?
15. Don't forget **PR** - note the number of people who use magazines, TV and radio when researching their holiday.
16. When dealing with **tour operators** remember the three steps to sales; preparation for the sales pitch, the actual sales pitch and follow up. Many businesses make the mistake of not following up - usually the most important step to close a sale! Stay in touch with them throughout the year. Keep them updated with your news. Ask for the business!
17. **Partner** with other local tourism providers to enhance the impact of your combined sales actions.



18. Respond to **customer enquiries** quickly, efficiently and accurately. Give them the answers they are looking for and identify ways to add value to the facts so they are persuaded to buy. Dealing with sales enquiries is an important task - if someone has contacted you they are preparing to buy, don't lose the sale.
19. The secret to sales is **understanding your customer**, trade or consumer. The more you know about what motivates them, the more successful you will be in all your efforts to grow sales.
20. **Monitor** the impact of your sales efforts. Make sure you know what's working and what isn't. Learn from mistakes and tailor your sales plan for the future - don't waste time and money repeating activities that didn't work.
21. Why not market and sell directly to your **previous** international visitors, example €10 discount for next direct booking.
22. Ensure **imagery** and **language** on your website is selling to the international visitor and not just the domestic.
23. Remember that every **phone call** and **email** received is a sales opportunity; everybody is responsible for selling.

BUSINESS SUPPORTS

Business Supports

Fáilte Ireland offers a range of business supports to help you grow your business. Full details can be found on www.failteireland.ie

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