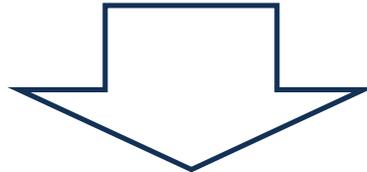


# Italian Strategy for Growth 2013-2015

## Executive Summary

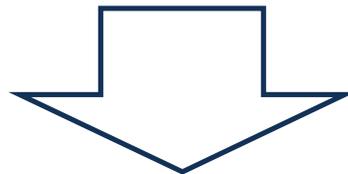
**Our Vision**

Record Numbers of Italians discover the rich experience of the island of Ireland and share with their friends



**Our Goal**

Visitor Numbers to the island of Ireland will reach 300k in 2015  
30k for Northern Ireland

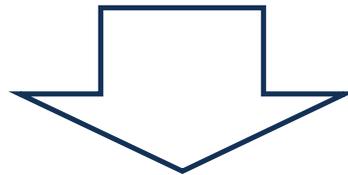


**Our Key Consumers Segments**

Italian Culturally Curious

Italian Social Energisers

Italian Great Escapers



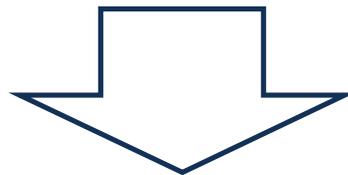
**Our Experience Propositions**

Awakening the Senses

Living Historical Experiences

Active In Nature & Culture

Vibe of the City



**Our Approach**

Inspire Consumers

Communicate Vibrant Experiences

Share the Holiday Conversation

Work With Partners

I am delighted to present our *"Italian Strategy for Growth 2013-2015"* which is designed to grow Italian visitors to the island of Ireland to 300,000 by 2015 – an increase of 24% on 2012 levels.

Working with industry partners across the island and in the market, we have developed a new strategic approach and an actionable plan which will help focus our marketing decisions and promotional activities.

We have identified three new primary holidaymaker segments which offer greatest potential and significant opportunities for future growth. We will capitalise on the already high levels of interest in the destination – we're fifth on Italians' list of top ten places to visit – and convert this interest to actual travel.

The review also pinpoints a number of potentially powerful motivators we can tap into to build growth – the island's emerging reputation for quality fresh local cuisine can help entice Italians (the world's most food conscious visitors) from all three segments; families or "Great Escapers" will be targeted for the first time by highlighting our landscape and cultural heritage; and we will capitalize on Italians' enthusiasm for social media by making it easy for them to share their holiday experiences here online, both during and after their visit.

I would like to thank our industry and trade partners for their contribution to this review. We look forward to continued close cooperation with them on the next phase, the implementation, as we bring compelling holiday experiences to the attention of our new Italian 'Culturally Curious', 'Social Energisers' and 'Great Escapers' best prospects.



Niall Gibbons,  
CEO Tourism Ireland

## The Italian Holiday Market

Italy has a population of 60.6 million and an outbound tourism market to Europe of 24 million. It is the 8th highest source of tourist expenditure globally, but 2013 is predicted to see a decline in outbound Italian holiday makers driven by the economic crisis and political uncertainty in Italy. There was a 27% decline in Italians taking holidays between 2009 and 2011. The outbound holiday market is expected to return to growth by 2014. Island of Ireland's share of Italian outbound visitors is around 1% and Italians represent 3% of total visitors to the island.



- The main source of Italian holidaymakers is from the North of Italy (Lombardy, Emilia Romagna, Piedmont, Veneto) and from Lazio (Rome).
- Italians have generous holiday entitlements of 26 days, on average.
- Fewer Italians are taking holidays abroad of 7 days + (down from 47% to 31% of the outbound market).
- Italians prefer sun holidays, followed by romantic holidays, city breaks and active outdoors.
- Italians travelling abroad tend to travel in couples : (22.5%), as groups of friends (19.2%) and families (19.1%). Just 11.5% travel alone.
- The island of Ireland currently receives a higher than average share of younger holiday makers.
- Internet penetration is growing with 58% of the population on-line. Smartphone usage is high at 28% and growing rapidly.
- Travel related products were the top ranking goods and services purchased online.
- The average Italian household spends 19% of disposable income on food (vs 15% EU average). They will pay for quality but expect value for money.

## Motivations:

- Italian visitors' main motivations for a holiday on the island of Ireland are beautiful scenery, opportunities to explore the local culture and history and visiting a vibrant/exciting destination.
- Food, Art and Culture are more important influences for Italians than for other nations.
- The top spontaneous mentions as reasons to visit the island of Ireland were beautiful landscapes and Dublin, for culture and atmosphere.

## Competition:

Tourism Ireland's brand tracker research ranks Ireland at joint 5th place in the list of top 10 destinations Italians wish to visit, behind Spain, US, France, GB and alongside Greece and Portugal. In the widest sense, these are the destinations which the island of Ireland must compete against to achieve our share of the Italian outbound market. Even traditional sun destinations like Spain now position themselves as cultural tour and city break destinations, while thanks to currency fluctuations, appealing medium haul destinations in the US have become more accessible to Italians than ever before.

However, immediate competitors for the island of Ireland for main summer holidays can be considered to include Scotland, Austria and Canada. We also compete against a myriad of European city break options including such cities as Paris, London, Barcelona, Prague, Berlin and Istanbul.

## Opportunities for growth

- Island of Ireland provides a great experience - Word of mouth on Ireland is very positive.
- The starting point is strong - the island of Ireland ranks 5th place in 'Top 10 destinations' Italians say they wish to visit.
- Dublin has a strong image - culture, atmosphere, fun.
- 37 000 Italians studied English in Ireland in 2012; they represent a rich potential for word of mouth, as well as repeat visits in the years to come.
- Tourism Ireland's new website '*Irlanda.com*' & the new customer engagement management will help to inspire visitors to choose the island of Ireland.
- On-going innovation in island of Ireland experiences: "new news" will stimulate the market for "must see" experiences. eg. the Wild Atlantic Way



## Key insights for 2013-2015

- **Island of Ireland cultural experiences should be more vibrant to achieve stand out against competitors** - The TI brand tracker showed that the island of Ireland did not score as highly in terms of opportunities to explore local culture/history and being a vibrant/exciting destination versus our nearest competitor (Scotland).
- **We need to bring the beautiful Irish landscape to life for Italian visitors** - despite a good reputation for landscape, spontaneous mentions are vague and few specific experiences or locations identified.
- **The island of Ireland's emerging reputation as a source of fresh and local food has potential to capture interest** - Italians are motivated by food when travelling - this presents a great opportunity to create new stories and experiences for potential visitors.

- **Potential to be a family focused destination** - Italian families are motivated by the opportunity to enhance their children's cultural awareness through travel to an English speaking destination and the experience of a different culture in a friendly and accessible environment. There is existing evidence on line of interest in active cultural breaks on the island of Ireland among Italian families.



- **Opportunity to grow the City Breaks market** - extended city breaks are part of the island of Ireland's core business from Italy and demonstrate clear potential to be developed further. We will optimize social media and other online communications to convey the range of exciting experiences - new and old - that await discerning and trend conscious prospective visitors to our cities.



**Increase visitors from the current estimated figure of 242,000 in 2012 to 300,000 in 2015 with 30,000 of this total visiting Northern Ireland.**

## **Our Approach:**

To match our brand strengths, keep focused, stretch resources and ensure effectiveness, each idea and action included in the strategy is designed to:

**Inspire** - We will keep consumers' needs and motivations at the heart of all activities, taking our inspiration from what has moved and delighted previous visitors, and what they are looking for from their holiday.

**Communicate vibrancy** - Our communications will focus on highlighting vibrant experiences in both urban and rural settings which have the power to resonate most strongly with Italians, so as to deliver on our brand promise of a holiday which offers Italians a uniquely joyful, immersive experience. Our communications will also create and maintain a perception of the island of Ireland as a HOT destination (happening, ownable, talkable).

**Share the holiday conversation** - We aim to be part of the holiday conversations of our target Italian consumers at all stages of the holiday journey. We will implement a strong word of mouth strategy (WOM) to identify and join in as many online conversations as possible, and encourage visitors to share their experiences both during as well as after their trip.

**Work with partners** - As a niche destination in a large market, with limited resources, we will add value to our activities where possible by working with partners with mutual interests or complementary skills. This includes partners within the Irish industry, Italian trade, and access providers.

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## **Northern Ireland:**

Our strategy with respect to growing visitor numbers to Northern Ireland in particular, is to position Northern Ireland as an integral part of the island of Ireland holiday experience, rather than as a stand-alone destination. Bearing in mind the current context of limited direct air access, promoting Dublin as the gateway to Northern Ireland allows us to engage a much wider audience, both for short breaks and for longer touring holidays. It is an area of the island which offers unique and iconic experiences with the potential to attract both first time and repeat visitors from Italy. However since it is still less well known to Italians than other regions, Northern Ireland has potentially a stronger appeal for repeat visitors in particular, who are more confident in exploring new places and motivated to discover something new. Repeat visitors amount to 20% of all Italian visitors. We identify Northern Ireland as being at the heart of the core experience propositions for each of the 3 market segments identified in this strategy.

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## **Consumer Targeting Strategy:**

We have identified 3 primary target segments for holiday makers from Italy with the greatest potential to deliver growth. The segmentation is based on demographic, behavioral and motivational factors identified from the Survey of Travellers, online visitor feedback and pre-visit discussions online. We also compared our segments with the segmentation recently developed for the GB market, and drew on the GB model to help us define the characteristics of the Italian market.

- 1. Italian Culturally Curious**
- 2. Italian Social Energisers**
- 3. Italian Great Escapers**

## 1. Italian Culturally Curious

- They are independent travellers and want to experience all a destination has to offer, both rural and urban.
- They are interested in authentic experiences and natural beauty and want the 'best' experiences to fill their itinerary.
- They like to explore local history and culture.
- They are motivated by local food experiences.
- They tend to be between 24-35 years old and travel as a couple or with friends, are likely to rent a car and engage in light outdoor activities.



### Experience Propositions for the Italian Culturally Curious segment:

We will engage the Culturally Curious by helping them to connect with the unique beauty of the Irish landscape and highlighting positive experiences around food they can enjoy on the island. We will also motivate them through experiences which bring to life the rich history on the island of Ireland, and which will evoke strong emotional responses that will be truly memorable

**Awakening the senses** - We will replace the vague image of the island of Ireland with a range of experiences that will stimulate a strong emotional connection to the landscape. We will identify a selection of iconic beauty spots on the island of Ireland with the power to trigger intense emotional experiences likely to inspire Culturally Curious Italians - e.g., the romance of a sunset on the Cliffs of Moher, the magnificence of the Atlantic Seaboard complete with seal and dolphin watching opportunities; the rural landscape of the entire island populated with easily accessible farm animals (sheep, cows, horses etc) in a way not found in Italy due to climate and culture; the sheer wonder of the Giant's Causeway, shared with friends.

Italians care deeply about good food. Food is a key sensory motivator to experiencing new cultures for Italians and offers great potential to differentiate

the island of Ireland against our key competitors - particularly Great Britain and Scotland.

**Living Historical Stories** - Exploring the local culture is also important to this segment, who want to experience the very best that a destination has to offer. We will bring to life stories from the island of Ireland for Italians before they arrive by means of virtual interactive experiences and by tapping into word of mouth endorsement that will help generate excitement around the island's cultural offering by making it more accessible and so stimulate intent to travel.

### Actions:

**Inspire** - We will inspire potential visitors by framing special experiences in beautiful locations and inviting people to share their own inspiring natural moments.

**Communicate** - We will highlight the message of good local food by capturing stories which communicate the passion of local artisan providers and producers and channelling them through an Irish "food Ambassador". We will target Italian food TV programmes, blogs and journalists with a sense of excitement, of something new and happening.

We will offer simple, fun ways to create itineraries in advance of travel which take in the island's most iconic cultural experiences. This will help potential visitors to imagine themselves already there.

**Share the holiday conversation** - We will use social media to draw attention to and encourage sharing the best ways to let the Irish landscape inspire. We will make our culture and history more easily understood in interactive and entertaining ways via Facebook applications. Triggered by PR initially, the campaign around discovering Irish food has real potential to start discussions online and content seeding around food topics in Italy offers a real opportunity to win additional visitors. We will explicitly encourage visitors to share their experiences during their holiday

**Work with Partners** - By highlighting the natural inspiration experiences they offer, Irish providers can give us stories to feature as part of our campaigns. To make it easier for consumers to engage, we will actively encourage partners to provide resources in the Italian language.

Key partners for this experience pillar include the two tourist boards, as they develop and promote new experiences which leverage our unique natural environment and culture e.g., the Wild Atlantic Way or the Causeway Coastal Route, as well as Irish and Italian operators with specialist offers such as garden tours, gourmet trails, photography and art tours.

We will explore with Bord Bia's local team the potential for synergies through working together to promote the food experience proposition in the Italian market.

## 2. Italian Social Energisers

- They use their short breaks to discover the urban culture but also to relax and escape stress.
- They spend four days in Dublin, often on an extended Bank Holiday - so have time to explore.
- They like to have a mixture of culture, fun, nature and live music but little outdoor activity- they want to relax.
- Good value food experiences add value to their holiday
- They are either on a romantic break as a couple, or coming for a more social time with groups of friends.
- The age profile is dominated by the under 35's.



### Experience Proposition for the Italian Social Energisers segment:

We will communicate to Italian Social Energisers that the urban atmosphere on the island of Ireland is immersive and distinctive. Not just Dublin, but also Belfast, Cork and Galway are fun and exciting cities, and it's easy to connect with their distinctive culture. Italians spend an average of four days on city breaks, creating an opportunity to encourage visits to other locations nearby, creating an even more vibrant city experience.

**Vibe of the City proposition** - Building on existing perceptions of Irish cities as places to experience a lively pub scene and an authentic tradition of live music, we will add even more experiences. We will create an expectation that there is always something new and interesting to discover, such as festivals, markets, "pop up" shops and restaurants. Opportunities to go beyond the urban experience and tap into the "real Ireland" by

taking in day trips to places nearby is part of the core proposition of an Irish city break and adds romance to it.

### Actions:

**Inspire** - We want to inspire this segment to put a trip to an Irish city on their "must do" list over the next 3 years.

**Communicate** - We will present them with compelling propositions which highlight what's new, ensuring the value message is also covered. We will communicate the spirit of regeneration and creativity in Dublin and Belfast in particular, through a focus on contemporary music, food and shopping.

**Share the holiday conversation** - Italian Social Energisers like to keep abreast of what's new and cool, as well as knowing what classics must not be missed. To keep them informed about the HOTTEST experiences Irish cities can offer, we will target the best forums and blogs for weekend travel inspiration, such as "turistipercaso.it" or "irlandando.it" and participate in discussions there. We will 'content seed' on contemporary music websites to highlight great gig or festival opportunities (with sufficient lead in time for advance flight purchase). Other topics to share will be new restaurants and temporary shops that are 'popping up' and themed guided tours, reflecting current trends and attitudes.

We will encourage this highly "social" segment (who more than any others tend to be "always on") to share their experiences online during as well as after their holiday.

**Work with Partners** - Partners for this experience proposition need to be city focused, and some suggested partners are: day tour providers, city pass offers, music venues, accommodation providers, Guinness Storehouse, Jameson & Bushmills' Distilleries, Titanic Museum and the Online Travel Agents.



## 3. Italian Great Escapers

- Italian families who want a holiday that is both fun and improves their children's awareness and understanding of other cultures, ie their "cultural capital".
- Couples in their early 40's with one or two children aged 6-12 years. They are likely to rent a car and to pre-plan activities before departure.
- Family holidays are highly valued, so they want guarantees of special experiences to share as a family.
- Good value and good quality local food experiences are an important element of the family holiday.



### Experience Propositions for the Italian Great Escapers segment:

Position the island of Ireland as a destination for 'soft adventure and cultural immersion' for Italian families. Enquiries around 'children too' holidays on the island are already strong online. Italians want their children to experience the wonder and joy of a new culture and experience itineraries that include wildlife, different landscapes, legends, folklore and fun family activities which will inspire memorable "adventures".

### Getting Active in Nature & Living Historical Stories

- The island of Ireland is the perfect place to introduce children to new cultures, and to share the adventure of discovery as a family. It becomes a kind of dynamic "outdoor museum" for young Italians and their parents, where they can connect easily with nature and culture at first hand while travelling around the country.

## Actions:

**Inspire** - We will inspire parents and children pre-departure by providing lots of ideas of why the island offers a real outdoor and fun learning environment, and how easy it would be to experience a range of different activities there.

**Communicate** - We will tailor content on 'irlanda.com' for families for vibrant and interactive communications. Involving children in the development of the communications, especially on line will help to increase engagement. The island's thriving film animation industry could provide inspiration for some of the materials such as the 'Story of Kells'.

**Share the holiday conversation** - We will link into Italian parenting networks, to create inspiration for this type of holiday and to create strong word of mouth about the island of Ireland as a place where there are lots of local children and child related products, accessible non-threatening wildlife and unspoilt sea shores to be explored, a rich range of folklore with child heroes and fairy tale "little people". To increase share ability we will design Smartphone scrapbooks for uploading prior to trips, with both fun and educational content - that could be shared in classrooms and with friends seeking advice on family forums and through "Mammy blogs". We will encourage families to share their experiences online during as well as after their holiday, as endorsements from other parents are especially valuable in motivating this segment.

**Work with Partners** - Partners for this proposition include stunning natural phenomena such as the Cliffs of Moher, Killarney Lakes, Marble Arch Caves and Giant's Causeway, the island's National Parks, Pet Farms and "Irish experience" providers such as Causey Farm. We will work with child focused product providers on the island (e.g., Antrim Fairy Glen, the Leprechaun Museum) and local market portals or Tour Operators specialising in family travel, e.g., 'bimboinviaggio.com' to establish the island of Ireland as a location for safe family adventures and frame them in an educational context.

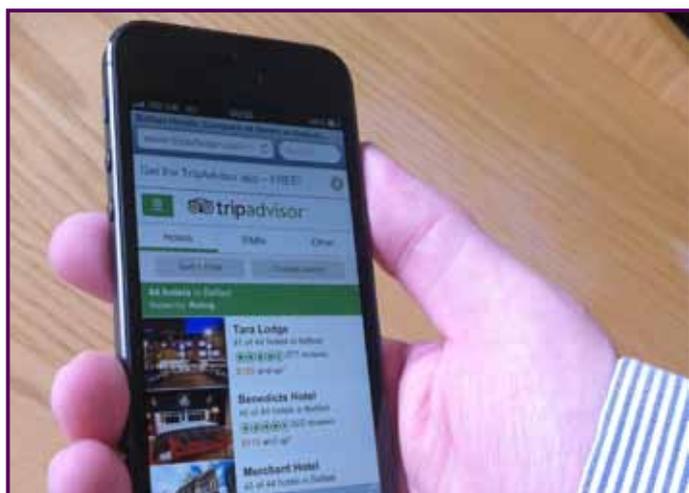


## Trade & Access Strategy

Throughout this review, the role of partners in developing new propositions, targeting additional and new consumers, marketing experiences and above all creating access has been recognised as essential to achieving growth.

**Tour Operators:** Tourism Ireland works with a number of 'Ireland Specialists' and Irish tour providers in the Italian market. Organised visitors have not increased relative to independent travellers over the last few years. Opportunities to increase organised tours over the next three years will be explored with Italian operators.

**Travel Agencies:** Travel agencies are still a key element for up to 20% of Italians. The rapid move online by Italians is creating new opportunities for Tourism Ireland to provide training to agents and also to target them with content /links on island of Ireland experiences and products.



**Irish Industry Partners:** We will work with all industry partners on the island of Ireland who have the resources and skills to engage with the Italian market (e.g. Italian speaking staff, web content in Italian etc.) and encourage them to develop experience propositions for the identified segments. Irish based tour operators running specialised offers such as garden tours, gourmet trails, photography and art tours will be encouraged to target the Italian market. We will also target Irish industry with existing Italian business to expand their operations by presenting them with opportunities to work with us in the implementation of this review.

**Access providers:** Increasing access has been pivotal to unlocking demand from the Italian market, and 2008 access declines inevitably impacted performance. Access has been increasing slowly in 2011-2012 but based on our targets we will need to increase at a faster rate to meet the demand created by the new strategy between 2013

and 2015. Tourism Ireland calculates that an additional 1,100 seats per week would need to be created in order to meet our targeted demand.

- Increase Capacity - We will work closely with Aer Lingus and Ryanair to increase capacity in the high season especially from Northern and Central Italy and to ensure that sufficient capacity is maintained for short breaks that are taken across the year.
- Lobby for a Belfast route - The lack of substantial direct access remains a barrier to developing the full potential for Northern Ireland from the Italian market, especially for Social Energisers. Working with Belfast airports, we will continue to seek new opportunities to develop direct access, and to lobby existing carriers to expand their services.
- Connecting with other Airlines - To assist further in creating additional capacity for high season we will work in collaboration with the airport authorities to target additional airlines such as Alitalia or Vueling to develop scheduled services to the island of Ireland.

Note : EFL is an important specialist segment in its own right. As such, it is outside the scope of this review, which focuses on leisure segments only.



The island of Ireland attracts a relatively small share overall of outbound Italian tourists, but has a strong reputation as a destination with a vibrant culture and natural beauty. We have successfully attracted young sightseers and culture seekers, but there is an opportunity to refine our targeting, broaden our appeal and encourage longer stay visitors in greater numbers.

We have identified three distinct consumers segments: Italian Culturally Curious, Italian Great Escapers & Italian Social Energisers. We will target each of these segments with experience propositions that will have the greatest appeal and relevance for them.

We will do more to leverage our vibrant culture and bring key experiences to life for Italians, so as to encourage trend conscious Social Energisers to visit our cities and hinterlands. We will present the natural beauty of our landscape in a more experiential manner so that it becomes associated with intense emotional experiences which will in turn encourage word of mouth and a sense of urgency to visit among the Culturally Curious.

Irish food is growing in quality both in production and provision, and we will communicate this good news story to the most food conscious visitors in Europe to stimulate their curiosity and interest. Understanding the island of Ireland's stories provides a path to a deeper connection with the landscape and culture, and we will exploit the rich heritage of myths, legends and indigenous music and literary traditions to this effect to draw in Italian Great Escapers. We will also encourage Italians to revisit the island and specifically to travel to Northern Ireland to experience the iconic experiences on offer there, from the Giant's Causeway to the Titanic museum.

The role of our partners in developing these new propositions is critical to achieving our growth ambition. Tourism Ireland will work with industry partners in Italy and on the island of Ireland in sharing this review and supporting their efforts to deliver growth.

Our growth ambition will only be realised with support and collaboration from access providers and airport authorities to increase capacity and introduce new routes.

We have outlined the steps that we will take to achieve these objectives, and using our technological advantage (specifically our new website and enhanced Customer Engagement Management or CEM) and strong industry partnerships, we look forward with confidence and ambition to welcoming record numbers of Italians to the island of Ireland by 2015.



## Sources and Acknowledgements:

Tourism Ireland and Savage research would like to offer a sincere thank you to all the people who took the time to provide their insights and views on the Italian visitor market, and who participated in the Insights to Action workshop. Your contribution was invaluable.

### Primary Research:

Fáilte Ireland, Northern Ireland Tourist Board, Tourism Ireland, A Touch of Ireland, Emerald College, Abbey Tours, Ornella Gamacchio (PR Consultant), Cristina Gambero (travel journalist), Facebook Interviewees, Cocktail Viaggi, Irlandando.it, Carat, Publicis, Aer Lingus, Ryanair, Volagratis, Venere.com, Boscolo, Hotelplan, Insieme Viaggi.

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