



Germany represents a strong growth opportunity for tourism to the island of Ireland.

Germany is the world's largest outbound travel market and the third largest source of visitors to the island of Ireland. Around 450,000 German visitors come here every year and contribute revenues of almost €300m. Despite consistent growth from the market since 2004, the global downturn has taken its toll in 2009. While German visitors account for around 5% of all our visitors, this represents less than 1% of all German holiday trips overseas. Given this, and the very favourable perception of the island of Ireland amongst prospective German visitors, we believe that there is a real opportunity to grow our business from Germany.

During the second half of 2009, Tourism Ireland undertook a strategic review of opportunities in Germany. This included a detailed analysis of market performance, consultation with German tourism industry experts and new qualitative consumer research. The review confirmed that the island of Ireland holds strong appeal for many Germans. However, it identified a need to bring the compelling benefits of a holiday here more sharply into focus if we are to convince German holidaymakers to put the island of Ireland at the top of their list of desirable destinations.

Specifically, while Germans appreciate our beautiful landscape, we need to show them "stand-out" things to see and do while they are here to enhance their image of the island. We also need to reassure them that we have the tourism infrastructure to make it easy for them to do the things they like to do on holiday. Finally, the island of Ireland seems somewhat remote for German holidaymakers and we will need to convince them that we are closer and more accessible than they think.

This publication describes the findings of the review and outlines the strategy and actions which we believe will unlock the potential of the German market. The review benefitted from the expertise and enthusiastic cooperation of tourism professionals in both Germany and on the island of Ireland. I would like to thank you all for your support with this project. We look forward to working with you to win strong business from Germany in the coming seasons.

A handwritten signature in black ink that reads "Niall Gibbons". The signature is written in a cursive, flowing style.

Niall Gibbons, CEO, Tourism Ireland

We will sharpen how we target our main holidaymaker segment, Sightseers & Culture Seekers and we will add a further segment, Outdoor Actives.

Targeting To Date:

We will adopt a more focused approach to targeting. To date we have targeted the broad holidaymaker segment, Sightseers & Culture Seekers. We will now target more specific life stages.

Sightseer & Culture Seekers are people with above average household income whose main holiday motivation is exploring a country's sights and finding out about its culture.

We have successfully targeted this segment of German holidaymakers over the past number of years. This is a large segment in Germany with a strong interest in visiting the island of Ireland. Our targeting to date has focused more on the older Sightseer & Culture Seekers, especially those aged 50 and older.

Targeting 2010-2013:

Our work for the Germany strategic review assessed growth potential among the outbound travel market.

Based on this review we will target three sub-segments within Sightseers & Culture Seekers:

- Young Sightseer & Culture Seekers aged 25-34
- 'Mid-Age' Sightseer & Culture Seekers aged 35-54
- Mature Sightseer & Culture Seekers aged 55+

Of these three sub-segments, Mid-Agers represent the strongest growth opportunity. They represent the largest volume segment in the market and they also have a high propensity to visit the island of Ireland. All of our activity will target this core "Mid-Age" segment as well as over-spilling to the younger and older Sightseers & culture seekers segments. The younger segments will also be targeted through social media and we will target the older segments through the travel trade.

In addition we will also target 'Outdoor Actives'. These are people who enjoy the outdoors and physical activity on their holiday. This segment is relatively niche. However it is an attractive growth opportunity because, they stay longer when on holiday and we can use media efficiently to communicate targeted messages.

The German travel trade is also a key audience and they will be actively engaged with using a number of initiatives.

We will prioritise communications to four types of holidaymaker in Germany

Young Sightseers & Culture Seekers (age 25-34)



They want...
Immersion

They enjoy... discovering the authentic island of Ireland through engaging experiences with our people, our place and our culture.

“I want to get close to the real Ireland.”

'Mid-Ager' Sightseers & Culture Seekers (age 35-54)



They want...
Stimulation

They enjoy... escaping to a new world, leaving their cares behind in a well organised destination that allows them to be as spontaneous as they wish on holidays.

“I want to to escape to a world of new discoveries.”

Outdoor Activities



They want...
freedom

They enjoy... the taste of freedom they experience on the island of Ireland through our beautiful landscape and engaging people.

“On holiday, I want to explore the outdoors and get away from the modern world.”

'Mature' Sightseers & Culture Seekers (age 55+)



They want...
Enrichment

They enjoy... feeling enriched by experiencing a different culture and by building knowledge and understanding of that culture..

“I want to dive deeply into a country's culture.”

We will focus on strategic growth priorities to realise the strong potential of the German tourism market

To realise our growth potential from Germany, we need to convince best prospect holidaymakers that the island of Ireland delivers an experience that is inspiring, involving and immediate. These are the big priorities to drive growth over the next four years.

The strategic growth priorities to guide our four year German leisure tourism marketing plan are shown opposite.

Everything we in the tourism industry do to drive leisure growth from Germany needs to be inspiring, involving and immediate in order to achieve these goals.

In order to make the most of our opportunity in Germany, we will engage the German and Irish travel trade in order to ensure that our strategic growth priorities are consistently conveyed through all platforms.

We will also invest to drive ambitious business tourism growth. We will show German business event decision makers that Northern Ireland and the Republic of Ireland are very much 'in business'.

Be INSPIRING

We will demonstrate how the island of Ireland offers truly iconic 'stand-out' holiday experiences.

Be INVOLVING

We will prove that the island of Ireland delivers a 'joined-up' range of holiday experiences that is easy to plan, deliver and engage with.

Be IMMEDIATE

We will stimulate re-appraisal among German people about the ease of travelling to the island of Ireland and the value for money available when in Ireland.

Be IN BUSINESS

We will create energy & excitement around the island of Ireland as an easy & effective business tourism destination.

2010-13 Strategic Growth Priority:

be INSPIRING



We will demonstrate how the island of Ireland offers truly 'stand-out' holiday experiences.

Our Marketing To Date:

In addition to delivering access and value messages, our communication focus to date has been to reassure German holidaymakers that the island of Ireland has enough things to do and see during their holiday.

Recent research among prospective holidaymakers highlights a need to strengthen the focus of our core message.

The Challenge we face:

Our research shows that German Sightseers & Culture Seekers and Outdoor Actives are positive towards the island of Ireland as a holiday destination. However, beyond our beautiful landscape, German people are not clear what the iconic 'stand-out' reasons to visit the island of Ireland are.

Ireland is out of focus for German holidaymakers. They find it hard to imagine what they will actually do on a holiday in Ireland, and so they show a lack of urgency to follow up their basic level of interest.

Reassurance that the island of Ireland has enough things to do and see on holiday is still important. But it is not sufficient in itself to bring an island of Ireland holiday 'into focus' for German consumers.

We need to show German people why they should think of the island of Ireland as a 'must visit' destination. We need to show them what they will experience and be able to talk about when they return.

We will give German holidaymakers big, exciting and inspiring reasons to make visiting the island of Ireland worthwhile; rather than a variety of smaller reasons.

...be INSPIRING

2010-13 Actions for Growth

We will build our marketing communication in Germany around a set of iconic, yet tangible, island of Ireland experiences. This will give people compelling reasons to come to “the top corner of the map” (of Europe), as described by one German holidaymaker, rather than a collection of small reasons.

Our research shows that three types of iconic experience resonate most powerfully in Germany: iconic experiences built around our History & Culture, our Celtic Myths & Legends and our Breathtaking Landscape.

We will prioritise communication of attractions that are designated as iconic island of Ireland experiences, including the following:



Making It Happen

We will:

- 1 Communicate iconic Northern Ireland and Republic of Ireland attractions as tangible experiences in order to bring the benefits of visiting the island of Ireland clearly into focus.
- 2 Create online experiences that enable prospective German holidaymakers to interact with island of Ireland iconic attractions.
- 3 Make use of strong, impactful images, video and storytelling so that we bring alive the island of Ireland brand promise of an experience that is unique, spontaneous, engaging and fun.
- 4 Invest in national TV and Cinema campaigns for the first time in ten years, alongside outdoor print and radio campaigns.
- 5 Extend the 2010 Saint Patrick's Day celebration to become a week long campaign that creates excitement for and engagement with the island of Ireland.
- 6 In addition to extensive radio and print co-operations and online activities, we will implement innovative marketing activities that create attention and interest for the island of Ireland, including:
 - Surprise street happenings such as an 'Irish dance flash mob',
 - Guerrilla PR activities such as screening of iconic island of Ireland images onto house walls in key cities.
 - Ireland days' in at least 30 German travel agencies.

2010-13 Strategic Growth Priority:

be INVOLVING



We will demonstrate that the island of Ireland delivers a 'joined-up' range of holiday experiences that is easy to engage with.

Our Marketing To Date:

Our website for Germany (www.entdeckeirland.com) includes a journey planner where people can find information on attractions, accommodation and other details they may need to plan their island of Ireland holiday.

This resource provides holiday planners with information of exciting things to see and do. Future enhancements will show how these experiences can be 'joined up' in order to enhance the holiday experience.

The Challenge we face:

Recent research indicates that many German people have difficulty picturing what a holiday on the island of Ireland will really be like.

German people show a lack of knowledge about specifics on what there is to see and do on the island of Ireland. They also think that the island of Ireland is very far away – almost long-haul.

When German people think of Ireland, the imagery they conjure up is very 'heavy'; they think of turf fires, rain, mist, pub scenes. Our research indicates that showing German holidaymakers how they can get involved with a lighter side of the island of Ireland will be more motivating to them.

German people are looking for a type of 'controlled spontaneity' on holidays. This means they want some certainty that there will be a selection of options for them to choose what to do and see each day, thereby staying more in control of their holiday experience.

We need to demonstrate that the island of Ireland has a 'joined up' tourism infrastructure that will enable German holidaymakers make quick decisions on what they want to do while on their holiday, whilst also demonstrating the lightness, ease and fun of an Irish holiday experience.

"A good infrastructure is important. It enables me to do what I like."

Prospective Holidaymaker, Munich

"I want to be spontaneous, but at the same time, I would like to have all the comfort from a country that is prepared for tourists."

Prospective Holidaymaker, Cologne

...be INVOLVING

2010-13 Actions for Growth

The internet is by far the most used source of holiday information for three of our targeted holidaymaker segments: Young and 'Mid-Ager' Sightseer & Culture Seekers and Outdoor Actives. Social networking, which is growing strongly in Germany, is proving to be a powerful way to engage with younger holidaymakers.

We want to give German people certainty that they will easily fill their holiday with enough compelling things to do and see and that they can easily get involved with the island of Ireland experience.

A key part of this strategy will be the creation of a '360°' online island of Ireland holiday planning tool that enables people to create tailored itineraries and holiday possibilities. This offers the opportunity to link more things to do and see to our lead iconic experiences. It will help German holidaymakers really visualise a holiday in Ireland.

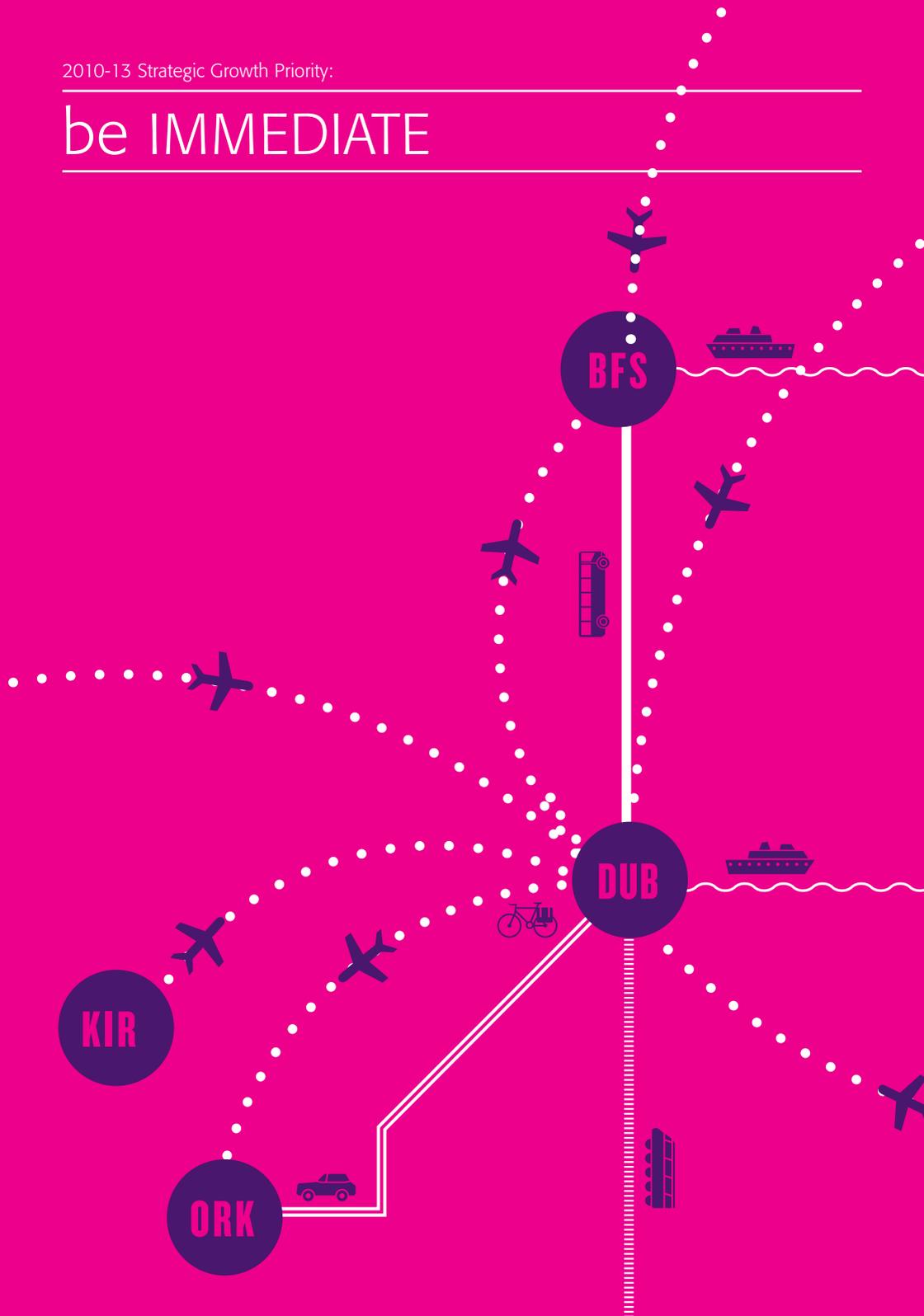
Mature Sightseer & Culture Seekers use travel specialists as much as the internet to source holiday information. We will engage the German travel trade to use the 360° Holiday Planner, and other supports such as providing coach tours with sightseeing opportunities. We will also create initiatives around 'Ireland Ambassadors' (Ireland characters and German visitors who can give valuable insider 'tips' on getting the best out of an island of Ireland holiday) PR, celebrities and word of mouth in order to make the Irish experience more tangible.

Making It Happen

We will:

- 1 Launch an online '360° Holiday Planner' with sample itineraries, a forward to 'friend' function as well as mapping, saving and printing functions.
- 2 Implement a new social media strategy that will better communicate with a younger target audience through greater use of key online communities such as Facebook and YouTube.
- 3 Increase the number of Web Page sponsorships with branded tactical special offers (including Expedia, opodo, weg.de)
- 4 Grow our PR presence and focus on unique and compelling reasons to go to the island of Ireland.
- 5 Build presence in national and regional media through 'Materndienste' (national and regional messaging through news feeders).
- 6 Develop an Icons Trail in order to engage younger travel writers in Germany.
- 7 Create celebrity opportunities with people such as Ronan Keating, Reamonn and other Irish celebrities who are well known in Germany.

be IMMEDIATE



We will stimulate re-appraisal among German people about the ease of travelling to the island of Ireland and the value for money available when here.

Our Marketing To Date:

Over the past year our core marketing strategy has placed strong emphasis on tactical messages.

Tourism Ireland's print and online communications in Germany have included a price offer message whenever possible.

This has been in addition to the price / access-led communications that comprise our co-operative marketing partnerships with island of Ireland carriers, accommodation owners and attraction owners.

The Challenge we face:

Our research shows that an island of Ireland holiday feels somewhat remote to German people.

Travelling to the island of Ireland from Germany involves sailing or flying across the seas. In a country with ten land borders, and where travel abroad is so easy, we feel quite remote; almost long haul!

Not having investigated island of Ireland access in detail, many German people imagine it is relatively difficult to reach and relatively expensive.

People show a high level of interest in coming to Ireland on a holiday, but lack any sense of immediacy. They believe they can visit any time. When they begin to look more closely at what a holiday in Ireland entails, people tend to form a weak opinion of the island of Ireland's "good all round value".

Our challenge is to make an island of Ireland holiday feel more immediate to German people and thereby inspire them to book sooner.

...be IMMEDIATE

2010-13 Actions for Growth

We will communicate strong value, access and holiday 'bundle' offers, integrated with the "Go Where Ireland Takes You" message.

Our research indicates that the decision to choose the island of Ireland feels like more of a commitment than a trip to a neighbouring German destination or even GB or Scandinavia. Our tactical messages will include a strong branded experience to underline the uniqueness of the value offer.

We will also strengthen our travel trade and carrier co-operative marketing partnerships.

The value which Sterling continues to offer versus the Euro will underpin all communication for Northern Ireland.

Making It Happen

We will:

- 1 Partner Aer Lingus with national TV communications centred on tactical messages.
- 2 Engage in a range of co-operative campaigns to promote access and value with all carriers and market operators.
- 3 Create strong online, radio and email newsletter campaigns that will make the island of Ireland more immediate to German holidaymakers.
- 4 Extend co-operative marketing programmes to non-tourism partners (e.g. a supermarket chain promotion with high profile island of Ireland brands).
- 5 Use our extensive and innovative 2010 Saint Patrick's festival to increase talkability about Ireland and inspire people to book Ireland now.
- 6 Create an innovation programme to develop actions that will stimulate re-appraisal of the ease of access and value that the island of Ireland offers.

Re-energise trade partners in order to create excitement around a new Ireland offering and grow potential of prospective holidaymakers aged 55+

The Challenge we face:

Mature Sightseer & Culture Seekers are more likely to use the traditional travel trade when planning and booking their holidays.

The German travel trade is highly sophisticated, but with an increasing number of holiday destinations competing for their attention, it is a challenge for the island of Ireland to stand out.

2010-13 Actions for Growth

We will significantly increase the number of selling opportunities for the Irish trade in Germany.

We will re-energise the German and Irish travel trade in through investment in the following:

- More face to face contact with the German travel trade.
- Extended online training to include Ireland icons & Celtic myths & legends.
- Re-focus on group operators and escorted holidays, which are more appealing to the over 55s.
- Maintain the success of fam trips, e-zines and Trade Website.

Germany's most prestigious travel trade event, the DERTOUR Reiseakademie, held annually by the market's largest Ireland operator, DERTOUR, took place in Killarney in November 2009. We have an excellent opportunity to build on the momentum created during the event. We will continue to engage with the participants of the Reiseakademie through various communication activities, such as:

- Direct mailings
- Online social media interaction
- Travel agency & client evenings
- Local PR events
- Booking competitions

be IN BUSINESS



We will create energy & excitement around the island of Ireland as an easy & effective business tourism destination.

The Challenge we face:

The Business tourism sector in Germany, especially the Incentives category, has reduced significantly since the global financial downturn. Our primary Business Tourism targeting focus to date has been the Incentives sector followed by Corporate meetings and conferences.

A key challenge is to broaden our targeting base to the Association Conference sector.

However, we face two hurdles to grow our Business segment:

- German business event decision makers do not spontaneously think of the island of Ireland as a place to do business. Like holidaymakers, they associate us with beautiful green countryside, and not much else.
- German business event decision makers are not sufficiently confident in our ability to deliver the fundamentals of a business event. Specifically, they need reassurance about our ease of access, our business tourism infrastructure (facilities, transport, communications) and the value for money we offer.

Actions for Growth

We will build the island of Ireland business tourism strategy around five key elements:

- 1 Broader Targeting: Expand beyond incentives prospects to include association conferences and corporate meetings.
- 2 Business Basics: We will communicate four 'business basics' of value, access, venue range and quality and professional and creative local conference support
- 3 Business Brand: Failte Ireland's new business tourism brand platform is designed to build confidence in our business tourism capability by positioning the island of Ireland as an engaging and stimulating destination that enables decision makers to create remarkable events.
- 4 Direct Contact: Continue to engage in face to face contact (exhibitions, briefings, 'Fam Trips' to the island of Ireland) and Customer Relationship Management programmes.
- 5 Northern Ireland: We will continue to invest in programmes to specifically promote Northern Ireland as an attractive business event destination.

Key Points

- 1** Germany is the world's largest outbound travel market and the third largest source of visitors to the island of Ireland.
- 2** A positive outlook towards the island of Ireland combined with a relatively small island of Ireland market share in Germany means we have a strong opportunity to grow tourism from Germany.
- 3** Consumer research indicates four best prospect holidaymakers for the island of Ireland in Germany:
 - Young Sightseer & Culture Seekers aged 25-34
 - 'Mid-Age' Sightseer & Culture Seekers aged 35-54
 - Mature Sightseer & Culture Seekers aged 55+
 - Outdoor Actives
- 4** To realise this growth opportunity, our key challenge is to bring the compelling benefits of an island of Ireland holiday more sharply into focus for German holidaymakers.
- 5** We will achieve this by convincing best prospect holidaymakers that the island of Ireland delivers an experience that is inspiring, involving and immediate.
- 6** In relation to holidaymakers, we will:
 - Demonstrate how the island of Ireland offers truly 'stand-out' holiday experiences.
 - Demonstrate that the island of Ireland delivers a 'joined-up' range of holiday experiences that is easy to engage with.
 - Stimulate re-appraisal among German people about the ease of travelling to the island of Ireland and the value for money available when here.
- 7** In relation to the travel trade, we will re-energise trade partners in order to create excitement around a new Ireland offering and grow potential of prospective holidaymakers aged 55+.
- 8** In relation to business tourism, we will create energy & excitement around the island of Ireland as an easy & effective business tourism destination.

We are grateful for the contributions made by experts within the German and Irish travel trade throughout the Germany Market Review including:

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