Tourism Airlan's Corporate Plen 2011 – 2013

30th Sictimmer 2011

Tourism Airlan's Corporate Plen 2011 – 2013

Executive Summin' Ap

1. **Review o' Tourism Airlan's Corporate Plen 2008 – 2010**

2. **Goals, Veesion an' Mission**

3. **Meercet Context**

4. **Targets fer 2011 tae 2013**

5. **Tourism Airlan's Strategy 2011 – 2013**

5.1 Brand Strategy
5.2 Airtin an' Communications Strategy
5.3 Channels Strategy
5.4 Industry an' Thrade Strategy
5.5 Access Strategy
5.6 Norlin Airlan Strategy

6. **Resourcin' the Plen**

6.1 Organisational Alighnment
6.2 Budget

7. **Missurin oor Success**

8. **Enn**

Caase Study 1: An Airtin oan GB

Caase Study 2: An Airtin oan Channels

Caase Study 3: An Airtin oan Access

Appendix 1: Summin ap o' Islan' o' Airlan Promotable Visitor an' Catter Forecast

Appendix 2: Visitor, Promotable Visitor an Catter Targets 2011 – 2013

Appendix 3: Efficiency Savins Delivery Plen (Annex E)

Tourism Airlan's Corporate Plen 2011 – 2013

Executive Summin Ap

Wi'oot doot this bes Tourism Airlan's maist important Corporate Plen sine hit wus stairtit oan accoont o' the unco scale o' the worl' wide economic doon turn an' the waefu' impact thon hes hed oan owreseas tourism tae the Islan' o' Airlan sine the middle o' 2008. Oor ettlin fer 2011 tae 2013 bes at owreseas tourism tae the islan' o' Airlan wul join tae graw agin, wul houl oantae hits meercet shaire an' wul hae the graith set oot fer the tim'. I wrochtin' oot thae targets we wur steered bae report o' the *Tourism Renewin' Curn* an' the *Thradin' an' Spennin' i a Smairt Economy 2015* fer Airlan an' fer Norlin Airlan bae the *Tourism Strategy fer Norlin Airlan tae 2020.* We alloo at oor ettlin wul mak iz fit tae deliver oan oor remit es set oot bae the Noarth Sooth Meenesterial Cooncil.

The mair at thair hes bein baag improvements i baith transport an' product infrastructure oan the islan' o' Airlan thair ir hannlins yet fer thaim i chairge o' tourism. We hae tae wrocht wi' yin anither tae mak' siccar at visitors ir gien things tae see an' dae an' unco an' compellin' stan' oot reasons tae cum an' visit, alang wi' maakin hit es easy es hit can bae tae get wittins an' tae buy thair holiday. The challenge fer the industry oan the islan' o' Airlan tae mak' siccar at the holiday offerin' bes a furst cless experience an' gies velue fer catter. We alloo at the strategy ootlined i the Corporate Plen addresses hitsel tae the hannlins at the islan' o' Airlan wul face ap tae i the cummin thrie yeirs an' at hit wul alloo iz tae gie graith i tourism visitors tae the islan' o' Airlan.

Tourism Airlan pit oan a key tourism event aa Farmleigh i Juin 2010. The inpit fae oor stakehaulders an' industry pairtners oan the day an' recommendations cummin fae hit wur gyely important i forderin the Corporate Plen.

Tourism Airlan recognises forebye the inpit tae this strategy fae the Airish Tourist Industry Confederation reports *Tourism an' Trevel Distribution i an Althered Worl' fer Airish Tourism* at cum oot lately.

Importance o' Tourism tae the Islan' o' Airlan

The islan' o' Airlan wus host tae 18.5 hame an' owreseas visits i 2009, gien €5.4 billion/£4.4. billion tae the economy i direct visitor spennin. Sim 7.6 million visitors fae owreseas gied €3.4 billion/£2.8 billion i earnins at wus 64% o' the fu' tourism earnins tae the islan' o' Airlan. Spennin bae hame visitors wha maide 10.9 million visits i 2009, gied anither €1.9 billion/£1.6 billion catter tae the islan's economy.

Owreaa, the direct economic inpit o' tourism tae the islan' o' Airlan cums tae 3.3% o' GDP i Airlan , quyhles tourism directly gies 2.1% o' GDP i Norlin Airlan. The mair tourism maks an indirect inpit tae the islan' o' Airlan bae the multiplier effect, es the catter at visitors spen' gaes through the economy. Tourism gies an important nummer o' joabs forebye heftin quhats thocht tae bae 229,000 joabs oan the islan' o' Airlan i 2009.

Oor Targets

Tourism Airlan bes ettlin fer compound yeirly graith o' atween -2.0% an' -4.4% i total nummer o' visitors, -2.0% tae +5.1% i promotable visit nummers an' a +4.2 tae +6.9% i catter ivry yeir fer the tim' o' this plen. Thae targets wul gie atween 21.1 million an' 22.2 million visitors an 9.1 million tae 9.7 million promotable visitors tae the islan' o' Airlan owre the coorse o' the Corporate Plen. Bae 2013, tourism cud bae fit tae mak' €3.6bn tae €3.8bn/£2.9bn tae £3.2bn ivry yeir fer the islan' o' Airlan.

Owre the cummin thrie yeirs, Tourism Airlan bes ettlin fer compound yeirly visitor graith o' +1.9% tae +4.2%, +1.9% tae +4.9% i promotable visitors an' catter graith o' +4.1% tae +6.7% fer Airlan. Thon wul mean at i 2013 atween 6.1 million an' 6.5 million visitors fae owreseas wul cum tae Airlan an' spen' atween €3.2bn an' €3.4bn.

Fer Norlin Airlan we ir ettlin fer average yeirly visitor graith o' atween +2.4% an' +5.7%, promotable visitor graith o' atween 3.5% an' +7.2% an' catter graith o' atween +4.8% an' 8.2% owre the cummin thrie yeirs. Thon amoonts tae 1.5 million an' 1.6 million visitors fae owreseas i 2013, gien £310 an' £340 million tae the economy.

Oor Strategy

Agin a gyely gurly beckgrun, Tourism Airlan hes unnertuk a baag review o' hits meercetin daeins an' strategy. We hae tuk a wheen o' key decisions aboot quhar we wul airt oor ettlins, oor energies an' oor gear owre the cummin thrie yeirs:

- The maist o' oor meercetin spennin wul gae oan the the fower source meercets at we alloo wul gie the bes' return – Great Britain, the United States, Germany an' France;
- Efter a re-airtin o' oor meercetin daeins tae runnerline the distinctive islan' o' Airlan experience, thair wul bae a return tae graith fae the GB meercet;
- Thair wul bae baag spennin oan e-business tae mak' siccar at the islan' o' Airlan's oanline presence bes maide stranger i line wi' consumer trends;
- We wul pit new emphasis oan branded destination advertising tae mak' competitive positionin' stranger;
- Thair wul bae a new airtin oan meetin' the access challenges at maun bae met tae re-stairt graith;

- Thair wul bae a carriet oan airtin an' energy oan grawin holiday business tae Norlin Airlan . We wul heft heirskeip events at wul bae hel' i Norlin Airlan owre the cummin thrie yeirs, amang thaim the anniversary o' the Titanic i 2012, the worl' Polis an' Fire Games an' the Derry/Londonderry UK City o' Heirskeip, an' the hostin' o' the Clipper Race stapowre i Londonderry tae naime onie a wee wheen.
- We wul waark wi' airt tourism intherests tae heft an' leverage key daeins an' attractions i the tim' includin' the 2011 Solheim Cup aa Kileen Cassle, Dublin Contemporary 2011 an' the return o' the Volvo Ocean Race tae Galway i 2012.
- Airlan's brand communications wul bae farder wrocht oot tae align closer wi' meercet differences an' the altherin profile an' needs o' holiday maakers tae mak' stranger the impact o' oor communications.

Sax strategic themes hae bein fordered tae sum ap Tourism Airlan's airtin fer the tim' 2011 – 2013. thae themes wul bae hefted bae an organisational programme at realigns oor budgets, oor fowk an' oor ettlins agin the sax strategic themes. The operational plens wul bae pairt o' oor yeirly business an' meercetin plens.

The sax strategic themes, an' the ootcums they wul gie bae 2013, ir:

Brand: Tourism Airlan wul inspire fowk tae chuse the islan' o' Airlan es thair chusen holiday destination bae shewin the benefits an' the unco nattur o' a holiday experience oan the islan' o' Airlan an' maakin stan' oot faer competitor destinations.

Airtin an' Communications: Uisin an' airted an' focused approach tae gien oot catter an' communications, Tourism airlan wul gie graith fae hairtmaist meercets an' target consumer segments.

Channels: A fu' suite o' integrated, intheractive an' engagin' channels wul gie maist reach an' impact i oor airted meercets.

Industry an' Thrade: Consumers wul bae fit tae get wittens an' buy the fu' range o' holiday products oan the islan' o' Airlan through key distribution channels.

Access: The forderin o' deeper relationschips wi' relevant Government agencies, depairtments an' carriers an' spennin oan case maakin an' co-operative meercetin campaigns wul heft wi' houlin oantae strategically important routes forebye tae the forderin o' new direct an' sea services.

Norlin Airlan: The depth an' breadth o' oor daeins wul heft wi' grawin catter, visitor an' promotable nummers tae Norlin Airlan at wul bae baager nor graith i Airlan.

Resourcin' the Plen

I the day's waefu' budgetary environment oor gear wul bae airted aa shewin the priority attached tae the fower meercets quhar we alloo the bes' chanst fer graith an' return oan spennin exists i the nex' thrie yeirs.

Missurin Success

Missurin the impact an' success o' the Corporate Plen wul bae a yeirly process an' wul bae reported i the Tourism Airlan Yeirly Report bae bein' reflectit i oor roullin strategic plens. We wul cairry oan reportin' oor owreaa visitor performance es missured agin a a wheen o' key competitors an' wul benchmairk oor performance agin worl'wide an' airt tourism graith owre the tim' o' the plen. Forebye reportin' oan macro missures laike visitor nummers an catter we ir committet tae missurin an' reportin'oan the aptness o' oor meercetin programmes fae the budgets we ir gien bae oor sponsorin' Government Depairtments. Oan accoont o' thon we wul we wul forder a return oan meercetin, investment model, fer tae missure an' fine tune oor gear allocation an' meercetin daeins.

Tourism Airlan alloos at the targets set oot i the plen ir challengin' agin the day's worl' economic beckdhrap an' we wul waark wi' aa stakehaulders i thair successful delivery, amang thaim oor sponsorin' Government Depairtments, Failte Airlan, the Norlin Airlan Tourist Boord an' industry representatives.

1. Review o' Tourism Airlan's Corporate Plen 2008 – 2010

Tourism Airlan's Corporate Plen 2008 – 2010 set an ambeetious target o' atween +4.2% an'+5.1% fer graith i visitor nummers ivry yeir. sine Tourism Airlan's main meercetin airtin bes oan attractin' promotable visitors(1), we targeted promotable visitors fer graith aheid o' the visitor targets.

Adae wi' the target fer catter Tourism Airlan's ettlin fer the thrie yeirs o' the Corporate Plen 2008 – 2010 wus fer nummers o' visitors tae pit atween €15.7/£10.5 billion an' €16.1/ 310.8 billion fer the islan' o' Airlan i earnins fae owreseas an no taakin in fares peyed tae carriers.

Nae boadie cud hae foresaen the waefu' impact o' the worl'wide macroeconomic hannlin hes hed oan trevel an' tourism efter 2007. amang the faictors at led tae the faa i earnins, visitor an' promotable nummers the islan' o' Airlan i the las' thrie yeirs ir:

CYCLICAL ALTHERATIONS

- The baagest worl' economic hannlin sine the Baag Depression led tae a baag faa i fowk's catter es unemployment riz an' the credit crunch stunted economic graith i 2009 an' 2010. Thon hed the ootcum o' a faa i spennable incum at hed the ootcum o' a faa i spennin oan discretionary erticles laike trevel.
- Afore the stairt o' the worl' hannlin oil prices hit a heigh o' $145 a barrel i 2008 makin airlines bring oot fuel surchairges oan passenger airfares. The bringin oot o' fuel surchairges brocht aboot a ris' i the price o' trevellin tae the islan' o' Airlan.

STRUCTURAL ALTHERATIONS

- Air access capacity tae the islan' o' Airlan fell bae -11% i 2009 an' bae -6% i 2010, maakin hit hairder fer visitors tae get tae the islan' o' Airlan.
- Velue fer catter joined tae faa i 2008 es the cost o' leevin riz, mair sae i Airlan, I spite o' thon getting betther the notion o' puir velue fer catter thon notion bes aboot yet.
- Mair meercet spennin bae ither destinations tae attract promotable visitors hed the ootcum o' a faa i the islan' o' Airlan's shaire o' visitors.

ENVIRONMENTAL ALTHERATIONS

- Twa o' the maist dreich simmers fer monie yeirs wur hed i Europe i 2008 an' 2009, quyhles the wunther o' 2009 wus the cauldest fer 40 yeirs. Es an ootcum o' thon cauld an' dreich weather visitors wur mair apt tae chuse a holiday i destinations at wur wairmer an' no sae wat.

---

(1) Promotable visitors bae fowk at visit the islan' o' Airlan fer holidays, tae lairn Inglis, tae gae a conference ir corporate gaitherin ir wha ir oan an' incentive trip.

- **Volcanic stoor fae the Eyjafjallajokull volcano hed the ootcum o' a baag faa i air trevel i Europe i Aprille an' Mey o' 2010 at cost the trevel industry i Europe mair nor €2 billion an' hed the ootcum o' a wrocht oot 212,000 less visitors tae the islan' o' Airlan an' the loass o' €130/£107 million i spennin bae visitors fae owreseas. Thon hannlin hed the ootcum o' mair uncertainness amang consumers adae wi' visitin' Europe an' uisin air trevel tae** cum bae.
- The stairt o' airport quattin taxes bae the Airish Government an' the air passenger duty i Norlin Airlan hes pit oantae the cost o' visitin' the islan' o' Airlan.

Thae faictors hed mich adae wi'the targets set oot i the Corporate Plen 2008 – 2010 no bein met.

2. GOALS, VEESION AN' MISSION

This Corporate Plen bes Tourism Airlan's 4th sine hit wus stairtet an' hits wi'oot doot the maist important gien the unco scale o' the worl'wide economic doonturn an' the waefu impact o' thon oan tourism tae the islan' o' Airlan fae owreseas.

Owre the lif'tim' o' this Corporate Plen Tourism Airlan wul ettle tae deliver the twa goals ablow:

- Mair tourism tae the islan' o' Airlan
- Heft Norlin Airlan tae get tae hits potential fer tourism

Oor veesion bes tae mak' the islan' o' Airlan stan' oot oan the worl' stage an' heft aa hit hes tae offair, maakin hit a maun gae tae destination leadin' tae the forderin o' a dynamic an' sustainable tourism sector oan the islan' o' Airlan.

Tourism Airlan's mission fer 201 tae 2013 wul bae tae:

A) Bring owreseas tourism tae the islan' o' Airlan beck tae graith,
B) Get meercet shaire beck,
C) Get Norlin Airlan a baager shaire o' the islan's tourism business.

Owre the lif' o' this plen Tourism Airlan wul cairry oot thon mission bae:

- Bringin' hits resources o' catter an' fowk tae bear oan meercets an' daeins at ir saen es haein the potential tae gie the bes' return i the cummin yeirs,
- Maakin siccar at the islan' o' airlanm bes airted es a gyely differentiated tourism destination ansuerin key hairtsum an prattical holiday motivations.
- Heftin ap intherest i visitin' the islan' o' Airlan bae new mintit destination meercetin campaigns at ir airted aa oor bes' prospects an metch locail meercetin needs.
- Maakin siccar at the islan' o' Airlan hes a strang presence an bes widely available baith i established an new distribution channels.
- Waarkin wi' key stakehaulders an' industry pairtners tae heft Norlin Airlan tae get tae hits fu' tourist potential.
- Gien a wheen o' airted promotional pletfoarms fer the tourism industry an' waarkin wi' thaim an' thrade pairtners oan co-operative campaigns getting' economies o' scale at mak' maist o' the available resources,
- Waarkin wi' airlines an' ferry consairns tae bring beck an forder access wies tae the islan' o' Airlan.
- Waarkin langside Failte Airlan an' the Norlin Airlan Tourist Boord oan shaired objectives.
- Maakin maist o' the efficiency an' guid waarkin o' the organisation tae gie the bes' return fae Tourism Airlan resources.
- Bein het tae get results an i deliverin excellence, heigh performance an' optimum uise o' resources.

3. MEERCET CONTEXT

IMPORTANCE O' TOURISM TAE THE ISLAN' O' AIRLAN

Tourism hes a gyely important roull i the catter an' social mak' ap o' the islan' o' Airlan an baith shapes an' bes shaped bae oor environment, heirskeip, economy an' society. Baith direct an' indirect tourism's reach bes baag. Tourism bes yin o' the baagest hame mintit an' sustainable industries oan the islan' o' Airlan.Hit hes monie differ stakehaulders an'bes integrated intae the hale economy. Hooiniver oan accoont o' the diverse nattur o' the tourism sector an' hoo deep an' wide hits reach bes hit can bae haird tae see, wi' the ootcum at hits velue isnae allus saen.

Agin the beckdrap o' the worl'wide economic hannlin 18.5 million owreseas an hame visits wur maide i 2009, gien €5.4 billion/£4.4. billion tae the economy bae direct

visitor spennin oan the islan'o' Airlan. 7.6 million visitors fae owreseas gied €3.4 billion/£2.8 billion tae the islan' o' Airlan. Spennin bae hame visitors (2) owre 10.9 million visits i 2009 gied a farder €1.9 billion/£1.6 billion tae the islan' o' Airlan economy.

I absolute nummers hame tourism amoonts tae 59% o'aa visits, wi' owreseas visitors maakin ap the remainin' 41%. Hooiniver owreseas visitors spen' mair an' stey fer langer an' sae mak' a proportionately baager inpit maakin ap 64% o' fu' revenue. The average catter maide per owreseas visitor wus €451/£370 i 2009, quyhles the average lengtht o'stey wus 7.8 nichts.

NUMMERSAN' CATTER – ISLAN'O' AIRLAN TOURISM

2009 Visits Holiday Maakers

Fu' Amoont

Source CSO, Tourism Airlan an' Norlin Airlan Tourist Boord

Owreaa the direct catter inpit o' tourism tae the islan' o' Airlan cums tae 3.3% o' GDP I the Airish economy quyhles Tourism directly gies 2.1% o' GDP i Norlin Airlan. (3) The mair tourism maks an indirect inpit tae the islan' o' Airlan bae the multiplier effect es the catter spent bae visitors flaws through the economy.

---

(2) Hame visitors ir thae visitors tae the islan' o' Airlan at ir fae the Sooth an/ir Norlin Airlan.
(3) Note at thair ir differ wies o' wrochtin oot the catter inpit o' Tourism i Airlan an' Norlin Airlan. Nummers gien ir fae Failte Airlan an' the Norlin Airlan Tourist Boord.

Es yin o' the worl's fastest grawin industries tourism gies a strang potential tae hae a key inpit intae economic recovery oan the islan' o' Airlan. Tourism gies waark, catter daeins an' exports heftin hoosehaulds, businesses an' communities athwort the islan' o' Airlan.

Tourism hefts a wrocht oot 229,000 joabs oan the islan' o' Airlan i 2009. Catter fae tourism hefts directly 25,000 joabs i Norlin Airlan, 3% o' hits waarkforce, wi' anither 14,000 indirectly hefted bae tourism, Maakin ap 4.7% o' hits waarkforce. Official nummers hae shewn at 123,000 waarkers ir 6.4% o' the waarkforce i Airlan ir directly employed i accommodation an' mait service daeins. Failte Airlan pits the nummer o' joabs heigher aa 190,000. Based oan employment projections tourism oan the islan' o' Airlan bes fit tae heft anither 10,000 joabs bae 2013.

Tourism baes a gyely waark intensive industry an' hit gies chansts fer new joabs athwort a wheen o' differ skeel levels. The mair tourism bes a baag instrument o' airt forderin gien chansts i airts wi'oot mich ither waark an' chansts fer graith. I particular tourism igies a guid wie o' heftin revitalisation, diversification an' economic forderin o' kintra airts.

Tourism bes maistly service based wi' mich o' the catter generated steyin i the locail economy. The mair tourism hefts the promotion o' "Brand Airlan" owreseas addin' velue tae ither exports an' the islan' o' Airlan es a hale.

Hame tourism wul stey a strang pairt i a sustainable tourism sector oan the islan' o' Airlan i tims tae cum. Hooiniver tae gie volume an' velue owreseas visitors ir gyely important an' getting meercet shaire i the competitive worl'wide meercet bes needfu'.

WORL' CATTER ENVIRONMENT

The worl' business environment hes althered quaak sine the catter hannlin i hairst 2008 aa stairted a deep economic collapse pittin economies athwort the worl' intae recession. Fordered kintras i particular hae bein waefully effected, amang thaim the islan' o' Airlan's key source tourism meercets. Catter recovery at steys the furst determinant o' tourist demand bes expectit tae bae slaw an' hannlins remain.

Maist kintras hae saen sma' bit steady recoverin' i the furst hauf o' 2010. The International Monetary Fund (IMF) alloos at thair wul bae worl'wide GDP graith o' +4.5% i 2010, faain a wee tae +4.25% i 2011. Hooiniver the pace o' recovery bes laugher i the fordered economies wi' the Euro airt expectit tae graw bae +1.0% i 2010 wi' 1.5% graith i 2011, quyhles the saime nummers fer the US ir +3.1% i 2010 an' 2.6% i 2011.

Aa the saime tim' the IMF warns aa the worl'wide recovery bes bruckle yet an' aa a slaw rate i maist fordered kintras. Strang secon' quarter graith i the German economy ris' the hope at thon micht caase mair graith athwort the Euro zone. Quyhles the apturn i the German economy gaes oan, thurd quarter graith faas compeered tae the secon' quarter heighlichtin the need fer oangaein monitorin' o' the worl'wide economic environment.

Fordered kintras cairry oan facin, ticht credit conditions, es oangaein catter hannlins affect credit supply fae the binks wha, accordain tae the IMF, cud bae sned mair bae uncertainty, exposure tae soverign risks an' ris' fundin' costs, maistly i Europe. Thon bes haein a knock oan effect oan the flaw o' credit tae businesses an' impacts forebye oan consumers tae get credit fer holidays.

Bein ootae waark hes grew tae mair nor 10% i monie o' the islan' o' Airlan's key tourist meercets an' bes apt tae stey heigh fer es far aheid es can bae saen es graith i waark maistly cums ahin economic mendin'. The IMF alloos at bein ootae waark wul stey heigh i 2010 an' bae a wee thing betther i 2011. Quyhles want o' waark i the US an' *United Kangrick bes expectit tae faa tae 9.6% an' 7.4% i 2011. Want o' waark i the Euro airtbes expectit tae bae 10% fer nex' yeir, amaist the saime es 2010.

Slaw economic recoverin wul bae apt tae mak' consumer confidence laigh an' spennin steys flet, bes apt tae mak' fowk mair aware o' velue. Efter faas montht oan montht the *Gfk NOP Consumer Confidence Index* shewed consumer confidence a wee thing betther i the United Kangrick ap fae -220 i Julai tae -180 i Ageest, hooiniver hit fel' beck i Sictimmer tae -20. aa the saime tim' the *Confidence Board Consumer Confidence Index* ris a wee bit fae 51.0 tae 53.5 fae Julai tae Ageest bit fel' tae 48.5 i

Sictimmer. Consumer confidence hes bein shook bae the catter crisis an' consumers stey nervous aboot tims tae cum. Strang oangaein improved consumer confidence bes needfu' tae dhrive graith i tourism demand i particular amang holiday maakers.

The cost o' oil cairries oan gaein ap wi' the IMF forecastin' a baseline cost o' US$76.20 a barrel fer 2010 risin' tae US$78.75 i 2011. Experts 'gree at the cost o' air trevel wul gae ap i the shoart tae medium tim', es fares the noo cannae gae oan gif the industry bes tae get beck intae profit. Hits apt at risin' fares wul gae ap mair bae an' expect5it ris' i aviation taxes an' the impact o' carbon taxes.

Amang ither potential hannlins agin getting beck tae graith i tourism ir risin' public deficits, impact o' tax changes an' ither unforeseen events laike nattural hannlins, terrorism threats an' possible ootbreks o' seekness.

THE WORL'WIDE TREVEL AN' TOURISM PICTUR

The worl'wide trevel an' tourism industry hes althered gyely i the pas' 10 yeirs. , adaptin' tae althered consumer trends an' reponin tae ootby hannlins. Mair lately the worl'wide catter hannlin hes had a baag impact oan the worl'wide trevel industry wi' sim destinsations getting hit tichter nor ithers. Competition bes getting hairder, wi' new destinations cummin oan ivry yeir es mair an' mair kintras see tourism es bein' a dhriver o' sustainable catter graith.

Worl'wide tourism arrivals hae cum beck intae graith i 2010 wi' cummin economies i Asia an' the Middle Aist stormin' aheid, quyhles fordered economies i Europe an' America ir mendin slawer.

WORL', EUROPEAN AN' ISLAN O' AIRLAN ARRIVALS

Worl' Europe Islan' o' Airlan

Source: ***tourism Airlan, United Kintras Worl' Tourism Consairn (2010)***

The islan' o' Airlan tholed the doonturn i arrivals wor' nor monie ither destinations i 2010, maistly fae GB (see Caase Study 1 A Focus oan GB), an, differ tae quhat bes happenin' i the res' o' Europe an' worl'wide, arrivals tae the islan' o' Airlan havnae yet cum beck tae graith. Waefu' sneds i access o' 13% fae GB an' 11% fae the US, alanmg wi' the relative size an' importance o' thae meercets, the waik US dollar an' rates o' exchange fer Sterling agin the Euro an' oangaein notions aboot heigh prices i Airlan hae nae doot played a pairt i thon faa i visitors tae the islan' o' Airlan.

The closin' o' European airspace es an ootcum o' the Eyjallajokull volcano hed a waefu impact oan the islan' o' Airlan. Aa tims mair nor 300 ~European airports wur shut fer sax days affectin' neir 10 million passangers worl'wide, wi' Europe losin' 14% o' passenger traffic i Aprille yeir oan yeir. The islan' o' Airlan an' GB tholed mair sporadic closures i the follaein weeks.

Owreaa the volcanic ash hannlin bes wrocht oot tae hae hed the ootcum o' 212,000 less visitors tae the islan' o' Airlan an' the loass o' €130/£107 million i earnins fae owreseas tourism. Es an' islan' destination at depends strangly oan air access, at gied 85% o' owreseas visitors i 2009, sich closins hed an immediate impact oan owreseas visitor nummers forebye affectin' consumers' trevel plens fer tims tae cum.

Quyhles the worl' economy is improvin' the severity o' the worl'wide doonturn hes althered consumer velues, spennin habits an' lif'style chuses i differ pairts o' the worl'. Thon led tae an' altheration i the wie consumers chuse an' plen thair holidays wi' less, shoarter an' close tae hame holidays getting tae bae the norm. Forebye thon velue fer catter bes gettin' tae bae an important influence i choosin destination wi' consumers airtin mair othe added velue an benefits tae bae gat fae thair holiday.

Terchnological forderins ir altherin the wie fowk get wittens aboot holiday destinations, quhar they leuk fer adwice an' fae wha an' the wie they uise tae beuk thair holidays. Inthernet penetrsation carries oan grawin athwort the worl' an'' the wie fowk uise the inthernet bes altherin aa the tim' forebye. User generated context hes grew mich es saen i the baag graith i social netwaarks, bloggin' an' review sichts at ir expectit tae graw mair i tims tae cum. Mair importantly uiser generated content bes mair influential quhan consumers ir maakin key decisions – an important consideration quhan airtin aa the post recession consumer. Es mobile inthernet an' an' smairt phone adaption graws i the nex' wheen o' yeirs, the potential fer tourists tae arrange an' rearrange thair trevel plens quyhles oan the gae wul ris'.

Consumer holiday needs ir altherin quaak forebye. Noo, mair nor iver, consumers ir leukin fer stimulatin' an' intherestin holiday experiences at wul hae the ootcum o' thaim feelin' balanced refreshed an' readie tae heid beck intae the hectic lif'styles at monie fowk hae the noo. Holidaymaakers hae less spennable incum an' ir taakin less holidays an' buyin a holiday bes a baager thing nor hit wus i tims pas'.

BRAND IMAGE

Quyhles tims hae lately bein challenging fer the trevel an' tourism industry worl'wide an i particular fer the islan' o' Airlan, Tourism Airlan bes confident at hit'll bae fit tae get beck tae graith an' bae fit tae compete oan a worl'wide scale gien the gye baag appeal at the islan' o' Airlan houls es a destination worl'wide.

A strang, positive brand image bes gyely important fer destination meercetin, es a destinations naime wrochts oot hoo mich consumers ir receptive tae a meercetin message an alloo at hit bes credible. Accordain tae the 2010 *Anholt-GfKRoper Nation Brands Index,* at missures the worl'wide naime o' 50 kintras, Airlan hes a gyely strang brand image athwort the worl', particularly i hits tap source meercets. Mair important the brand attributes quhar the destination scores bes' – nattural berauty, fowk an' heirskeip – ir the hairtsum attributes o' the islan' o' Airlan's tourist brand offerain. Airlan bes ranked 5th i France an' 7th i the US, UK an' Germany fer nattural beauty. I terms o' 'fowk' Airlan bes ranked 5th i the US, 6th i the UK an' France an' 13th i ~Germany, quyhles Airlan ranks 14th i the UK, France an' the US fer 'Heirskeip" an' 20th i Germany.

The guid brand image fer the islan' o' Airlan worl'wide correlates wi' a baag intherest i visitin. Hooiniver the mair holidaymaakers haein a guid tim' fer the islan' o' Airlan an' the fact at they ir strangly midndit tae visit i tims tae cum, fer practical raisons,(access, price an' distance), they havnae done sae yet. The challenge fer Tourism Airlan bes tae uise the strang image at the islan' o' Airlan houlds an' gie consumers unco compellin' raisons tae cum bae tappin intae the emotional benefits at they wul get fae thair holiday.

Consumer perceptions aboot Norlin Airlan es a holiday destination hae gat gyely betther i the pas' 10 yeirs. Hooiniver Norlin Airlan still faces particular hannlins adae wi' hits image, includin' safetie an' security an' quhats saen es hairdness o' access. Fer tae get owre thae barriers faced bae Norlin Airlan bad perceptions maun bae challenged bae mair positive yairns at wul big gap a desire tae visit.

The islan' o' Airlan benefits fae gye heigh visitor satisfaction levels i baith pairts. Strang satisfaction bes hairtsum tae getting business i tims tae cum, es research shews at wurd o' mooth ,(baith oanline an' face tae face), bes a key factor i chusin a holiday destination. Wi' aa the buzz at thair bes aboot new an' unco holiday destinations, the challenge fer Tourism Airlan bes tae mak' siccar at happy holidaymaakers "ganch excitedly" aboot thair holiday experience quhan they gae hame, sae es the islan' o' Airlan stans oot es a gyely desirable an' highly reccomendit holiday destination.

The want o' saen differentiation i quhat the islan' o' Airlan offairs tae visitors bes oor baagest hannlin, mair sae i GB at bes oor target meercet. British consumers struggle tae see the differ i quhat the islan' o' Air;an offairs compeered tae 'hame holiday' alternatives at ir saen es bein cheaper an' no sae mich hassle.

Notions aboot cost an' velue oan the islan' o' Airlan, quyhles getting' betther, still lag ahin oor competitors wi' visitors maakin mich mention o' the cost o' l.eevin i Airlan. T^hon maun bae addressed i the efter recession environment es consumers cairry oan placin mair emphasis oan velue fer catter.

The hannlin fer the islan' o' Airlan bes tae mak' siccar at oor brand steys relevant an' differentiated, at hit gies holidaymaakers wi' unco an' compellin' raisons tae cum an represents guid velue fer catter. This Corporate Plen sets oot Tourism Airlan's strategy fer meetin' the challenges an' maakin siccar at owreseas visitor nummers an' catter gae beck tae graith i the thrie yeir tim' 2011 - 2013

4. TARGETS FER 2011 – 2013

The hittin' o' the targets set oot i the Corporate Plen wul hae the ootcum o' atween 7.2 million an' 7.8 million visitors cummin tae the islan' o' Airlan i 2013. I settin thae targets fer Airlan we hae bein steered bae the *Tourism Review 'Curn* an' the *Thradin' an' Investin' i a Smairt Economy 2015* an' fer Norlin Airlan bae the *Tourism Strategy fer Norlin Airlan tae 2020.* The targets ir based oan the latest islan' o' Airlan tourist forecasts tae han' es gien bae Tourism Economics (wittens gien i appendix 1).

Tourism Airlan alloos an' owreaa visitor graith tate atween +6% an' +14% es a realistic target. Oor chuse o' target wus steered bae the considerations set oot ablow:

- **Gettin' beck tae graith i 2011 –** The mair at aa meercets ir faced wi' hannlins, Tourism Airlan bes ettlin fer a gettin' beck tae graith i 2011.
- **Houlin oantae meercet shaire –** A key consideration bes houlin oantae meercet shaire owre the lif'time o' this plen, particularly i oor tap fower meercets.
- **Conservative consumers haein the ootcum o' conservative targets –** Consumer confidence bes laigh i aa o' oor meercets es the catter hannlin hes maide consumers cautious aboot spennin catter.
- **Sneds i access mak' less o' oor ability tae get visitors fae oor main meercets -** sneds tae access micht leemit oor bein fit tae harnesh forecast graith i outbound traffic.
- **Velue fer catter perceptions affectin amoont o' visitor graith –** The mair at thair hae being ye strang improvements lately , negative perceptions stey amang monie consumers adae wi' velue fer catter oan the islan' o' Airlan.

Tourism Airlan hes maide uise o' a set o' notions tae set oot the range fer thae targets at ir ootlined ablow:

Laigher enn o' range	Heigher enn o' range
*Slae getting betther i direct air an' sea access i 2011 – 2013	* Steadie gettin' betther o' direct access tae the islan' o'Airlan
* Laigh levels o' graith i the worl'wide economy cairry oan affectin' key source meercets	* Oangaein improvement i the worl'wide economy wi' mair waark i key meercets
* Consumer confidence bes still laigh i key meercets	* Betther consumer confidence i key meercets
*Oangaein consumer consairns aboot velue fer catter oan the islan' o' Airlan	*Betther velue fer catter perceptions i oor tap fower meercets
* Nae baag faa i Norlin Airlan's security situation	* Nae baag faa i Norlin Airlan's security situation.

Thrie owre airchin notions cover baith target scenarios:

- The Ash Hannlin at hed a waefu impact oan nummers o' visitors i the secon' quarter o' 2010, wus a yinst aff event an' the associated altheration i the 2011 forecast tae tak' accoont o' thae ;loasses bes valid.
- Strang an' oangaein partnerschip wi' the tourism industry an' aa oor stakehaulders tae gie graith.
- Catter gien bae oor Sponsor Depairtments wul bae maistly the saime es budget forecasts i this paiper.

Hits tae bae noted at catter forecastin i the day's worl'wide climate isnae easy an' shud bae treated wi' an apt amoont o' caution bae the reader.

ISLAN' O' AIRLAN OWRESEAS TOURISM TARGETS 2010 -2013*

Islan o' Airlan	**2009 Ectual**	**2010 forecast**	**2010 Target**	**2010 /13 CAGR***	**2010/13 % Altheration**
Visitors					

Promotable

Revenue

Revenue

Note: Exchange Rate €1 = £0.82 *Target wul bae althered based oan final 2010 ootturn

Owreaa oor targets ir based oan getting graith i visitors owre the nex' thrie yeirs wi' a furst ris' o' +1.7% tae +4.0#5 i 2011, shewin the letting oot o' pent ap demand fer trevel i the meercets, a wee bit laugher graith o' +1.3% tae +3.8% i 2012 an' a baag apturn o' +3.0% tae n+5.5% i 2013 es meercet conditions gae beck tae langer tim' trends.

TARGETS FER AIRLAN AN' NORLIN AIRLAN

- I wrochtin oot thae targets we hae uised differ approaches fer Airlan an' Norlin Airlan wi' a mair optimistic an aggressive approach tae targets i Norlin Airlan. They wul alloo delivery oan the targets ootlined i the report o' the *Tourism Renewal Curn* an' the *Tourism Strategy fer Norlin Airlan tae 2020.*
- The mair optimistic approach fer Norlin Airlan targettin' +2.4% tae +5.7% compound yeirly visitor graith bes oan accoont o' the unco positive impact gien bae the baag daeins at ir gaein oan i the airt owre the tim' o' the Corporate Plen Titanic 2012, the Worl' Polis an' Fire Gaimes 2013, Derry-Londonderry UK Citie O' Heirskeip2013, an' the hostin' o' the Clipper Race stapowre oan the Foyle tae naime onie a wheen. Tourism Airlan wul unnertak monie meercetin daeins tae heft an' leaver thae events. We alloo at achieving thon streech target wul hae the ootcum o' Norlin Airlan grawin hits meercet shaire.

IRELAND TARGETS 2011 – 2013*

Islan' o' Airlan	2009 Ectual	2010 Forecast	2013 Target	2010/13 CAGR**	2010/13 % Change
Visitors					
Promotable					
Revenue					
Revenue					

Exchange Rate €1 = £0.82 *Targets wul bae althered based oan final 2010 oot turn
**CAGR = Compound Yeirly Graith Rate

VISITOR TARGETS 2011 – 2013

- Visitor graith hes bein targeted tae graw aa +6.0% tae +14.0% at wul keep ap the islan' o' Airlan's meercet shaire athwort oor main meercets. We hae set

differ graith targets fer each o' oor meercet airts based oan potential visitor graith wi'in ivry airt acroass the nex' thrie yeirs.

- Great Britain visitors ir forecast tae graw aa a mair modest +4.6% tae +11.2% fer the thrie yeirs o' the Corporate Plen, shewin a slawer recovery i outbound traffic fae the UK oan accoont o' the oangaein effect o' bein ootae waark, Government sneddins an' laigh consumer confidence.
- Mainlan' Europe's target wus set aa +7.6% tae +16% atween 2011 an' 2013. Mainlan' Europe's heigher target shews the middlin stable catter recovery o' oor main meercets we expect grawin meercet shaire based oan the islan' o' Airlan cairryin oan grawin strangly es a brand i thon airt.
- Visitors fae Noarth Amerikey ir targeted forebye tae generate strang graith o' +6.8% tae +17% acroass the thrie yeirs though a wee thing ablow the forecast graith rate fer traffic fae Noarth Amerikey tae Western Europe oan accoont o' mair loass o' access tae the islan' o' airlan relative tae destinations i Western Europe.

OWRESEAS VISITOR TARGETS 2011 – 2013*

Visitors	2010 Forecast**	2011 Target	2012 Target	2013 Target
Airlan				
Norlin Airlan				
Islan' o' Airlan				
Mainlan' Europe				
Noarth Amerikey				
Ither Airts				

Targets wul bae althered based oan the 2010 targets Forecast based oan Tourism Economic Model

OWRESEAS VISITOR TARGETS 2011 – 2013*

Visitors (% Graith)
Airlan
Norlin Airlan
Great Britain
Islan' o' Airlan
Mainlan' Europe
Ither Airts

* Targets wul bae althered based oan final 2010 ootrin **CAGR = Compound Yeirly Graith Rate

PROMOTABLE TARGETS

Tourism Airlan's main meercet airtin bes oan promotable visitors(4) at mak ap 44% o' aa visitors tae the islan' o' Airlan the noo. Promotable visitors ir important i keeping ap the tourism industry's infrastructure an' we alloo at thair bes a strang potential fae thon sector. Promotable visitor targets ir set tae graw aheid o' visitor targets fer Noarth Amerikey, Great Britain an' Mainlan' Europe wul gie graith i line wi' thair visitor targets. Ootlined i the tables ablow ir the promotable targets owre the nex' thrie yeirs bae geographic meercet.

PROMOTABLE VISITOR TARGETS 2011 – 2013*

Promotables (millions)	2010 Forecast**	2011 Target	2012 Target	2013 Target
Airlan				
Norlin Airlan				
Great Britain				
Mainlan' Europe				
Noarth Amerikey				
Ither Airts				

*Targets wul bae althered based oan the 2010 oot rin **Forecast based oan Tourism Economics Model

5. Promotable visitors ir fowk wha visit the islan' o' Airlan fer holidays, lairnin Inglis, Goin tae a conference/corporate maetin ir wha tak' an incentive trip.

PROMOTABLE VISITOR TARGETS 2011 – 2013*

Promotables (% Graith)				
Airlan				
Norlin Airlan				
Great Britain				
Mainlan' Europe				
Noarth Amerikey				
Ither Airts				

**Targets wul bae althered based oan final 2010 oot rin **CAGR = Compound Yeirly Gtaith Rate*

REVENUE TARGETS

We hae targeted a middlin sma' ris' i current revenues atween 2011 an' 2013. Ectual revenue wul graw i line wi' visitor graith. We dinnae expect onie ris' i real average spenninper visitor, at wul stey middlin constant athwort the tim' an' stey laugher nor the peak saen i 2007/8.

REVENUE TARGETS 2011 – 2013 (EURO)*

Revenue	2010 Forecast **	2013 Target	CAGR 10/13
Airlan			
Norlin Airlan			
Great Britain			
Mainlan' Europe			
Noarth Amerikey			
Ither Airts			

*Targets wul bae althered based oan 2010 oot rin **Forecast based oan Tourism Economics Model
***CAGR = Compound Yeirly Graith Rate

REVENUE TARGETS 2011 – 2013 (STERLING)*

Revenue	2010 Forecast**	2013 Target	CAGR 10/13
Airlan			
Norlin Airlan			
Great Britain			
Mainlan' Europe			
Noarth Amerikey			
Ither Airts			

*Targets wul bae althered based oan 2010 oot rin *** Forecast based oan Tourism Economics Model
***CAGR = Compound Yeirly Graith Rate Note: Exchange rate uised bes €1 = £0.82

Tourism Airlan alloos at the targets ootlined i this plen wul bae haird tae hit gien the day's worl'wide economic beckdrap an' hit wul waark wi' aa stakehaulders i thair successful delivery, amang thaim oor sponsorin' Government Depairtments, Failte Airlan, the Norlin Airlan Tourist Boord an' industry representatives.

Thae targets ir based oan the bes' forecast wittens tae han' bit they wul bae reviewed quhan the fu' visitor wittens fae 2010 bes tae han'.

6. TOURISM AIRLAN'S STRATEGY 2011 2013

Agin a gye turbulent beck grun, Tourism Airlan hes unnertuk a baag review o' hits meercetin strategy an' operations. Tae heft a return tae graith an' tae hit the targets set oot i the pairt abeen, we hae wrocht oot quhar we wul airt oor ettlins, oor energies an' oor gear owre the thrie yeirs aheid. I particular:

i. The feck o' oor meercetin spennin wul bae uised i oor fower source meercets wi' the potential tae gie the bes' return – Great Britain, the United States, Germany an' France, accause thae fower meercets gie neir thrie quarters o' aa owreseas visitors an' mair nor twa thurds o' owreseas catter tae the islan' o' Airlan.
ii. We wul get the GB meercet beck tae graith bae reairtin oor meercetin daeins, forderin new an' innovative meercetin in itiatives tae differentiate the islan' o' Airlan fae GB hame destinations, amang thaer daeins wul bae tae heighlicht the attractions o' N orlin Airlan.
iii. We wul mak' siccar o' the prominence o' Norlin Airlan i oor meercetin campaigns an' we wul airt oor messages tae dhrive graith.
iv. Thair wul bae a new mintit airtin oan brand destination, advertisin' quyhles waarkin wi' the industry an' thrade pairtners tae pit acroass velue messages.
v. The brand strategy wul unnerline the emotional benefits at the islan' o' Airlan can offair tae holidaymaakers, (realness, rejuvenation an', fer younger holiday ,maakers simulation) The tone o' oor brand communications wul bae fordered tae heighlicht the unco nattur o' a holiday tae the islan' o' Airlan.
vi. Targettin an' segmentation wul bae althered tae shew mair accurately the profile o' visitors an' quhat they need (ie the emotional an' functional benefits wanted fae a holiday).
vii. Thair wul bae baag spennin oan e-business tae mak' siccar at the islan' o' Airlan bes available an' bes fit tae get tae through the fu' range o' channels. We wul cairry oot monie e-meercetin daeins tae mak' stranger the islan' o' Airlan's presence i thon key channels.
viii. Thair wul bae a new new mintit airtin oan restorin' an' forderin access routes tae the islan' an' oan maakin siccar at the issue o' access bes heigh oan the catter agenda.
ix. Alang wi' Failte Airlan an' the Norlin Airlan Tourist Boord we wul stairt a Leisure Tourism Forum an' we wul waark thegither tae exploit an' heft key apcummin festivals an' daeins i owreseas meercets.
x. Organisational resources wul bae reairted tae gie betther velue fer catter an' tae optimise organisational guid waarkin an' effectiveness tae heft oor prioritised daeins.

Reflecti'n thae key airts o' focus, Tourism Airlan hes identified sax strategic themes at, quhan brocht in owre the nex' thrie yeirs, wul dhrive a return tae graith. Thae themes ir ootlined i the pages ablow. The operational detail o' thae sax themes wul bae pairt o' oor yeirly business plens.

5.1 BRAND STRATEGY

STRATEGIC OOTCUM WANTED

Tourism Airlan brand wul get consumers tae chuse the islan' o' Airlan es thair holiday destination bae pittin acroass the benefits an' unco nattur o' a holiday experience oan the islan' o' Airlan an' maakin stanoot fae competitor destinations.

ORGANISATIONAL AIRTIN

Thair bes ris awareness o' the unco nattur an' attractiveness o' the islan' o' Airlan brand an hit bes mair salient tae thaim at we ir targettin'.

Tae get meercet shaire graith , thair bes a baager need tae gie a strangly branded message at positions the islan' o' Airlan es an attractive holiday destination an' at differs the islan' o' Airlan fae competin' offairins. Tourism Airlan wul ris' the amoont o' daeins adae wi' brand communications.

The brand strangly appeals tae oor target audiences an' meets, ir bes betther nor, thair practical an' emotional needs.

The brand positionin' o' 'The islan' o' Unco Character an' Characters' an' the brand promise o' a spontaneous, engagin' an' crack experience ir compellin' an' mak' a distinctive position i the min' o' oor target consumer. Tourism Airlan wul airt oan reinforcing a wheen o' key functional attributes an' wul bigg an' emotional bond wi' consumers bae identifyin' an' communicatin' mair compellin' an' apt emotional benefits. Tae mak' baager the appeal o' the destination, we wul shew the unco nattur o' the holiday experience oan the islan' o' Airlan. Tourism Airlan wul forder a campaign notion at gies the brand positionin' an' promise, i a compellin' wie, an' at can bae biggit oan owre tim'.

OBJECTIVE 3: COMMUNICATIN' ICONIC EXPERIENCES

Ootcum Wantit Oor target consumers wul hae strang raisons o' thair ain tae visit The islan' o' Airlan.

Strategy: *Bae heftin ritual iconic experiences at bae unco tae the island' o' Airlan, Tourism Airlan wul engage potential consumers wi' the promise o' yinst aff experiences at cannae bae hed i ither destinations. We wul pittin acroass experiences at can bae delivered, differentiatin' an' emotionally motivatin' the potential visitor. We wul pit acroass experiences at leverage an' reinforce oor brand notion an bigg the imagery o' the destination uisin key channels at bes' pit the experience acroass.*

DELIVERIN' THE BRAND STRATEGY

	ECTION	DAEINS	RESPONSIBLE	DELIVERIN'
Prioritise brand Destination Communications	roull oot branded destination csmpsign daeins wi' a baager focus oan brand onie campaigns tae reinforce brand position i the meercet.			
	Cairry oan heftin tactical offairs es apt i particular quhan uisin communication vehicles at len' Thaimsels tae a price message. Aa offairs shud hae an experimental pairt tae mak' siccar o' fu Integrstion wi' oor suite o' ritual an' iconic experiences.			
	Regain brand stannout amang the competitive set i key meercets.			
Refine brand				

Positionin'	Position the islan' o' Airlan i a distinct wie at ris's emotional engagement an' maks Oor target consumers visit. Communicate the islan' o' Airlan's ain unco distinct position bae Maakin siccar at key assets, amang thaim realness o' hits fowk, frendliness, cracka, mait, Drink, music an' inspirin sichts, cum acroass i aa o' hits daeins
	Evolve the day's brand position. The island o' unco character an' characters, an' promise Tae gie a spontaneous, unchanging an' crack experience.
	Uise a mair crack an' informal tone i aa existin' meercets.
	Unnertak active an' oangaein evaluation o' oor brand positionin' relative tae oor core competitors
	Source an' mak' content acroass aa media tae gie the evolved brand an' tae repone tae altherin Consumer needs.
Communicate Unco Experiences	Unnerline the distinctiveness o' the islan' o' Airlan es a holiday destination bae the heftin o' unco holidays, icons o' the islan' o' Airlan an' the ectual leuk, feel an' soun' o' campaigns.
	Define an' uise ritual an' iconic experience intae aa apt communications.

****Abbreviations GB Great Britain, NA: Noarth Amerikey, ME: Mainlan' Europe, ADM: Australia an' Forderin Meercets.**

5.2 Airtin an' Communications Strategy

Strategic Ootcums Wantit

Uisin an airted an' focused wie o waarkin tae allocate catter an communications, Tourism Airlan wul gie graith fae core meercets an' target consumer segments.

Organisational Airtin

Tourism Airlan wul dhrive a communications an' airtin strategy tae gie impact wi' target consumers. Thon strategy wul bae supple acroass meercets quyhles heftin the core brand proposition.

Objective 1: Prioritise Resources

Wantit ootcum Tourism Airlan bes maakin maist o' owreseas business bae allocatin' gear i a wie at wul achieve the bes' possible return owre the thrie yeirs o' the Corporate Plen. Gear wul bae airted oan the fower meercets at gie the bes' potential owre the nex' thrie yeirs.

Thae meercets – Great Britain, The United States, Germany an' France ir baag i volume an' i the pas' hae gien the baagest pairt o' owreseas business. Oan accoont o' thair potential meercetin catter wul bae gien tae tae reflect the priority gien tae thae meercets an' tae heft mair effort at bes needfu' i the day's environment tae get mair graith fae thae airts. I ither meercets Tourism Airlan wul airt aa gettin' graith bae uisin the existin' meercetin catter tae get tae the bes' prospects i the maist effective an' guid waarkin wie. Forebye thon Tourism Airlan wul uise the talent an' experience o' hits waarkers i line wi' thon airtin. Oor spennin priorities fer 2011 ir shewn ablow an' we wul evolve thon ivry yeir es the gear tae waark wi' bes confirmed.

DELIVERIN OAN THE AIRTIN AN COMMUNICATIONS STRATEGY

ECTION	DAEINS	RESPONSIBLE	CENTRAL TEAM	DELIVERY DATE
Prioritise gear	Meercets ir stecked bae thair fitness tae gie business owre the lif' o' this Plen an' catter an' fowk resources ir pit oot accordain tae thon.			
Target consiarns Wha ir maist apt Tae trevel tae the Islan' o' Airlan bae Altherin o' consumer Airtin.	Meercets wul align thair target segments wi' the profile o' the day's holiday visitors uisin demographic an' psychographical missures.			
	Meercets wul airt oan the needs o' thair target segments bae communications.			
	Meercets wul airt aa aulder fowk wi' kintra holiday communications airted oan fowk an' heirskeip an' unnerline realness an' balance at hae bein saen tae bae compellin'messages fer thae fowk.			
	Meercets wul airt oan young fowk wi' toon brek communications an' Bae unnerlinin realness an' simeltaneousness at' ir saen es compellin' messagesfer thae fowk. Messagin' wul airt oan toons, spoarts, festivals, nicht lif an fowk.			
	Cairry oan wi' investment i heigh yield business tourism wi' an airtin' oan Dublin an' Bilfawst an' the furst cless new venues an' exper--iences appen tae conference an' maetin delegates.			
	Focus oan key product airts o' EFL at' graw the islan' o' Airlan naime es a furst cless destination tae lairn Inglis es a foreign leid.			
	Cairry oan spennin oan airtin aa the Gowf meercet.			
Airt aa the Diaspora Meercet	GB wul airt aa the Diaspora wi' a motivatin' consumer pletfoarm.			
	The US an' Canada wul roull oot niche meercetin programmes,airted Aa the Airish Diaspora an' Scotch Airish meercets.			
	Australia wul airt aa secon' an' thurd generations o' Airish Decendants. Australia wul leverage daeins, amang thaim the anniversary o' the Titanic, St. Pathrick's Day an' the stairt o' the National Exhibition o' the Airish i Australia.			

**** Abbreviations GB: Great Britain, NA: Noarth Amerikey, ME: Mainlan' Europe, ADM: Australia and Forderin Meercets.**

Tourism Airlan bes maximisin' visitors to the island o' Airlan bae airtin oan target curns at ir maist apt tae trevel tae the islan' o' Airlan.

Tourism Airlan wul bae altherin hits target consumer

Demographic wi' the day's current visitor profile tae the islan' o' Airlan at hes gat tae bae younger i the pas' wheen o' yeirs. Fer the feck o' oor target meercets the new consumer target wul bae a wee bit younger nor wus the caase tims sine. Thon younger demographic hes steyed stable i terms o' nummers o' visitors lately. We wul flex the target aige range bae meercet tae metch bes' chansts an, quhar apt, we wul

tak' a fresh approach tae oor messagin' tae satisfy naith younger an' aulder Sichtseer an' Heirskeip-seekers wha hae differ holiday motivations an' expectations. Es Gowf, Inglis es a Foreign Leid an business tourism visitors gie mich catter tae the islan' o' Airlan, Tourism Airlan wul cairry oan spennin tae heft thae segments i apt meercets owre the lif' o' the Corporate Plen.

Tourism Airlan's ective engagement wi' the Diaspora meercet bes haein the ootcum o' grawin intherest i an' visits tae the islan' o' Airlan.
The diaspora o' the islan' o' Airlan bes significant i scale an, i sim meercets gies a guid
chanst fer tourism oan the islan' o' Airlan. We wul bring oot a Diaspora strategy tae connect wi' thon segment. Tourism Airlan wul bae bringin' oot a suite o' tailor maide communications tae airt aa the Diaspora i Great Britain, the Noarth Amerikey an' Australian meercets. Airtin oan the Diaspora wi' wul heft baag events, amang thaim the anniversary o' the onie voyage o' the *'Titanic'* i 2012 an' the wider maarkin i Norlin Airlan tha' yeir, an' the 'Gaitherin' i Airlan i 2013. We wul luk intae forebye chansts wi' ither boadies an' agencies oan the islan' at hae an' intherest i the Diaspora.

Ection	Daeins	Responsible	Delivery Dates
Prioritise resources	Meercets ir stecked bae potential tae gie business owre the lif' o' the Plen an catter an' fowk resources ir gien accordainly.		
Airt aa consumers wha ir maist apt tae trevel tae the islan' o' Airlan bae altherin oor target consumer airtin.	Meercets wul align thair target segments wi' the profile o' current holiday visitors uisin demographic an' psycographic missures. Meercets wul airt oan the needs o' the target segments i aa communications. Meercets wul airt aa an aulder audience wi' kintra holiday communications airted oan fowk an' heirskeip an' unnerline realness an balance, at hae bein shewn tae bae compellin' messages fer thon segment. M eercets wul airt aa a younger audience wi' toon brek communications an' emphasise realness an' stimulation at hae bein identified es es compellin' messages fer thon segment. Messagin wul airt oan spoart, festivals, nicht lif' an' fowk Cairry oan spennin oan heigh yield business tourism wi' an airtin oan Dublin An' Bilfawst an' the furst cless venues an' experiences appen tae delegates tae conferences an' maetins. Airt oan key product airts o' Inglis es a foreign Leid, an' graw the islan' o' Airlan's naime es a furst cless destination fer thon. Cairry oan spennin pan an' airtin aa the Gowf meercet.		
Airt aa the Diaspora Meercet	GB wul airt aa the Diaspora meercet wi' a motivatin' consumer pletfoarm. The US an' Canada wul roull oot niche meercetin' programmes airted aa the Aiorish Diaspora an' Scotch Airish meercets. Australia wul airt aa second an' third generations o' Airish descent. Australia wul leverage daeins laike the anniversary o' the Titanic, St. Pathrick's Day an' the stairt o' the National Exhibition o' the Airish i Australia.		

Abbreviations: GB: Great Britain, NE: Noarth Amerikey, ADM: Australia an' Forderin Meercets

5.3 CHANNELS STRATEGY

DESIRED STRATEGIC OOTCUM

A fu' suite o' inthergrated, intherective an' engagin' meercetin communications channels wul gie maist reach an' impact oan target meercets.

Organisational Airtin

Tourism Airlan wul bring oot a channel strategy at maks maist o' the chanst fer intheractive consumer engagement an' maks oor brand fit tae bae amplified acroass aa channels. Thair wul bae a baager airtin oan digital communications atween the brand an' the consumer.

Objective 1 Implement impactfu' inthegrated communications

Tourism Airlan's message bes aligned acroass aa media pletfoarms tae mak' maist o'reach, impact an' brand cohesion.

Strategy
Tourism Airlan's Channels Strategy wul airt oan integrated meercetin communications acroass baith new media an' traditional meercetin pletfoarms. Oor brand an' communications messages wul bae inthergrated acroass heftin pletfoarms, publicity programmes, wurd o' mooth programmes, relationschip management programmes an' publications.i line wi' oor needs-based consumer segmentation model. I uisin multiple channels we wul mak' siccar oor customer touch points ir integrated an' biggit oan yin anither. Aa oanline an' affline assets i tims tae cum wul bae maide fer multi media usage tae meet thon objrctive.

Objective 2 Forder a New Consumer Wabsteid

Desired Ootcum
The islan' o' Airlan hes a consumer centred intheractive multi-pletfoarm wabsteid at bes content rich., easy tae get 'roun an' maks the consumer fit tae fin' an' beuk aa tha' bes needfu' fer thair holiday experience.

Strategy
Tourism Airlan wul forder a new wabsteid tae exploit advances i technology at enable a mair intheractive an' experimental wabsteid fer the day's consumer. The wabsteid wul bae maide tae airted aa maakin maist o' consumer engagement an' tae capitalise oan the exponential graith o' oanline social netwaarks. Hits gyely important at the Tourism Airlan wabsteid shews the islan' o' Airlan's destination brand an' offairs the consumer a brand-enhancin' experience. The new wabstied wul tak'in a search facility tae mak' hit easy fer consumers tae leuk fer accommodation, product pricin' an' gif hit can bae gat. Tae gie a han' wi' the forderin o' the new wabsteid a Digital Meercetin Tourism Taskforce wul bae stairtitn wi' Failte Airlan an' the Norlin Airlan Tourist Boord an industry pairtners.

Objective 3 Forder an' Bring Oot a Wurd o' Mooth Strategy

Desired Ootcum
Tourism Airlan's communications ir amplified bae generatin missurable positive wurd o' mooth aboot the islan' o' Airlan.

Strategy
Consumer speirins shew at wurd o' mooth bes still a gyely important channel quhar Tourism Airlan hefts an' dhrives intherest i the islan' o' Airlan es a holiday destination. Tourism Airlan wul bigg oan the success o' waark unnertuk afore i thon airt tae forder an' bring oot a strategy at wul mak' siccar at new technologies an' media alang wi' insichtfu consumer an' channel specific wittens ir uised i a creative wie tae mak' maist o' engagement wi' consumers an' tae dhrive business. Thon wul tak' i a specific strategy tae generate an' graw airted wurd o' ,mooth recommendations aboot taakin kolidays oan the islan' o' Airlan amang target cpnsumers. The objective o' the strategy bes tae uise consumer generated communications 'langside business tae consumer communications tae harnesh the pouer o' the personal recommendation an' tae turn'fans' o' the islan' o' Airlan intae 'active advocates'. Tourism Airlan wul mak' uise o' the quaak graith o' digital media an' grawin channels, amang thaim social media pletfoarms tae realise thon objective Tourism Airlan wul hae a wurd o' mooth pairt i all campaigns tae get customers tae mak' consumer referrals.

Objective 4: Ris' the uise o' Worl' Croass Meercet Channels

Desired Ootcum
Tourism Airlan hes a strang presence i worl' croass meercet channels.

Strategy
Tourism Airlan wul ris' the uise o' worl' channels at wrocht athwort meercet boundaries an' wi'in worl'wide oanline communities at ir shewin strang graith. Tourism Airlan wul airt aa dhrivin consistent an' coordinated wittens acroass channels tae mak' siccar o' sned through an' unity o' voice i the meercet place quyhles localisin' campsigns tae get baager consumer repone. Thon wul get baith economies o' scale an' encourage mair dispersion o' wurd o' mooth es per oor strategy.

Objective 5: Forder a Liberal Approach tae Sourcin' Rich Media Content

Desired Ootcum
Tourism Airlan hes a baag mixtie o' guid quality rich media content aa hits disposal at hit deploys es apt i ivry meercet.

Strategy

Tourism Airlan wul uise rich media content tae mak' maist o' the capabilities o' existin' technologies an' gie consumers an' intheractive 'Brand Airlan' experience. Hit wul tak' in text, sound, pictures, animation an' video fer tae mak' betther the level o' interactivity wi' the consumer.. Tourism Airlan wul forder a mair liberal wie tae get new content bae identifyin' an' getting' intherective digital media content fae a wheen o' differ sources tae pit acroass oor brand message bes'. Rourism Airlan wul waark wi' production consairns, ither agencies laike Failte Airlan an' the Norlin

Airlan Tourist Boord an' wi' consumers tae leverage the gear at wul mak' the bes' appeal tae owreseas consumers. Thurd pairty an' uiser generated content wul add credibility tae the braid islan' o' Airlan message.

Objective 6: Shift tae Oangaein Asset Forderin

Desired Ootcum

Tourism Airlan wul hae the uise o' an asset bink at bes apdated aa the tim i hits meercetin an' communications campaigns

Strategy: *Tourism Airlan wul shift tae maakin assets fer tae uise i hits campaigns oan an oangaein basis raither nor forderin new mintet assets ivry thrie tae five yeirs es bes the wie o' waarkin the noo. Thon wul gie mair suppleness i campaign roull oot lettin' iz react quaaker tae meercet altherations an' chansts es they cum ap.*

Deliverin' the Channels Strategy

Ection -	Daeins	RESPONSIBLE* GB NA ME ADM Central Team	DELIERIN DATES 2011 2012 2013
Dae pouerfu' Inthergrated Communications	Pit oot inthegrated an' pouerfu' communications acroass aa key channels maakin siccar at we get the bes' reach at can bae gat, (an' maist airted),wi' aa communicatios an' meercetin daeins.		
Forder a new Consumer Wabsteid	Forder a new wabsteid tae mak' maist o' consumer engagement. The new wabsteid wul hae aa product search functionality.		
Forder an' cairry oot a Wurd o' mooth strategy	Forder an' cairry oot an oan an' affline wurd o' mooth strstegy Maakin uise o' existin' an' new media. Maak siccar at aa oan an' affline daeins Hes a viral pairt an' sets wurd o' mooth aboot the islan' o' Airlan. Airt oor publicity programme oan generatin' 2Buzz" aboot the islan' o' Airlan an' tak' oan a proective wie o' airtin aa new heigh profile braidcast editorial an' sponsorschip chansts.		
Mak' mair uise o' worl'wide croass meercet channels.	mak' mair uise o' worl'wide an' croass-meercet channels tae dhrive the synergies an' spend efficiencies. Uise rich media content at' maks maist o' the aptnesses o' technology tae han' an' gies consumers an' intherective 'Brand Airlan' experience.		
Forder a mair liberal wie' o' gettin' rich media content	Identify an' get houl' o' intherective digital media content fae a wheen o' differ apt sources tae pit oor brand message acroass betther.		
Shift tae oangaein asset forderin	Shift tae maakin assets fer uise i campaigns oan an' oangaein basis.		

*****Abbreviations GB: Great Britain, NA: Noarth Amerikey, ME: Mainlan' Europe, ADM: New an' Forderin Meercets***

5.4 INDUSTRY AN' THRADE STRATEGY

Desired Strategic Ootcum

Consumers wul bae fit tae access wittens an' tae buy the fu' range o' holiday products oan the islan' o' Airlan bae key distribution channels.

Organisational Airtin
Bae waarkin closely wi' the industry oan the islan' o' Airlan an' key thrade owreseas Tourism Airlan wul mak' siccar at the fu' range o' ap tae date holiday experiences an' products can bae gat through aa distribution channels.

Objective 1: Tourism Airlan wul gie pletfoarms tae the industry sae they can close the dale bae executin' experience based velue offairs.

Desired Ootcum Efter the execution o' co-operative an' experience based velue campaigns mair consumers wul ahe beuked a holiday tae the islan' o' Airlan.

Strategy: Gien consumers temptin' offairs tae cum tae the islan' o' Airlan wul stey gye ly important owre the cummin thrie yeirs an' the industry bes gye guid aa turnin' speirins intae sales wi' attractive offairs. Oan accoont o' thon Tourism Airlan wul gie the maist apt pletfoarms an' chansts tae the industry sae they can heft thair offairs direc t tae the consumer. Thae offairs wul bae mair experience based an' wul bring thegither accommodation offairs wi' a notion o' place an' unco experiences an' daeins tae bae aa i thon airt. Forebye thon consumer offairs wul dial ap addit oan velue an' no onie gie price messages. We wul waark wi' the mait an' drink industry tae bring velue based offairs tae the owre'seas consumer. Tae heft thon ettlin Tourism Airlan wul cairry oan wi' hits spennin oan co-operative meercetin forebye an' we wul ettle tae get the industry tae invest wi' iz an' lead the velue message.

Objective 2: Gie strategic airtin an' meercet wittens tae the industry oan the islan' o' Airlan.

Desired Ootcum The bringin oot o' a new strategic airtin fer bye tim' tourism an' the forderin o' products an' services based oan altherin consumer demand s wul gie guid ootcums fer the tourism industry.

Strategy: Tourism Airlan wul waark wi' industry pairtners, Failte Airlan an' the NITB tae maak a Leisure Tourism Forum at wul forder a new strategic plen fer leisure tourism. Thon plen wul bae ambitiousan' innovative an' wul luk intae new channels an' chansts quyhles airtin aa gettin' business the noo fer the industry. Mair nor keepin' the industry ap tae date wi' altherations i meercetin, Tourism Airlan wul cairry oan gien the industry the latest speirins an' consumer insichts, sae they wul bae fit tae forder thair products an' services tae meet altherin consumer needs.

Objective 3: Ris business fae aa key distribution channels

Desired Ootcum Oanline bookins generated fer tourism products oan the islan' o' Airlan ir betther nor industry norms an' bye tim', gowf an' business tourism products can bae gat through key distribution channels.

Strategy: Tourism Airlan wul forder strategic alliances wi' key pairtners tae mak' siccar at islan' o' Airlan holiday products ir thaire tae buy oan key distribution channels . Es mair an' mair consumers ir buyin' thair holidays oanline, we wul

invest i the forderin o' strang an' lang lastin' relationschips wi' oanline operators wha trog bye tim' gowf an' business tourism products. Thon wul mak' siccar at the islan' o'A irlan bes weill represented an' at products can bae gat oan aa apt oanline trevel environments an' search pletfoarms. We wul forder co-operative campaigns wi' oanline operators tae heft wi' dhrivin traffic tae the islan' o' Airlan pairts o' thair wabsteids an' tae gie mair visability tae the destination aa point o' buyin'.We wul waark wi' the Norlin Airlan Tourist Boord an' Failte Airlan tae mak betther the skeels level o' the industry oan the islan' o' Airlan sae they wul bae betther fit tae heft thair products oanline. Tae mak' siccar at a holiday can bae bocht acroass aa distribution channels we wul deepen oor relationschips wi' traditional operators wha hae the baagest meercet shaire an' waark tae mak' siccar at islan' o' Airlan holiday products can bae gat fae thae operators. A thrade accoont management system wul bae pit intae place tae airt oor ettlins oan thae pairtners at can generate the maist business fer the islan' o' Airlan.

Deliverin' oan the Industry an' Thrade Strategy

ECTION -	DAEINS	RESPONSIBLE* GB NA ME ADM CENTRAL TEAM	DELIERY DATES 2011 2012 2013
Tourism Airlan Wul gie pletfoarms Tae the industry sae hit Can close the dale bae The execution o' Experience based Velue offairs	Keep a poor level o' spennin oan co-operative meercetin wi' industry an' meercet thrade. Waark wi' the Norlin Airlan Tourist Boord an' industry i Norlin Airlan tae mak' siccar o' fu' involvement wi' meercetin' chansts owreseas. Heft the experience an' velue wi' messages laike thaires niver bein a betther tim' tae gae oan accoont o' thair bein' clatters o' great an' differ things tae dae. Mak' meercetin chansts fer industry wi' campaign pages, topical e-zines an' heftins.		
Gien strategic airtin' an' meercet Intelligence tae the industry oan the islan' o' Airlan	Waark wi' Failte Airlan an' the Norlin Airlan Tourist Boord tae stairt a Bye tim' Tourism Forum. Waark wi' Failte Airlan an' the Norlin Airlan Toursit Boord tae educate the industry oan the islan' o' Airlan aboot the potential an' benefits o' daein e-business. Forder relationschips wi' the mait an' drink industry tae mak' mair o' thair Taakin pairt i tourism an' maistly tae leuk aa the issues aboot notions o' Puir velue fer catter. Infoarm the industry aboot the altherations i meercetin, latest research an' Consumer insichts tae the industry.		
Graw business cummin fae Aa key distribution channels	Bigg strategic partnerschip programmes wi' oanline operatorsat wul gie the bes' ootcums fer owreseas tourism Tae the islan' o' Airlan. Mak' maist o' traditional tour operator an' agency distribution netwaarks An' mak' maist o' oor spennin oan tour operator co-operative meercetin campaigns. Stairt ap a thrade accoont management system at wul alloo iz tae Prioritise oor daeins wi' key industry pairtners.		

**Abbreviations GB Great Britain, NA: Noarth Amerikey, ME: Mainlan' Europe, ADM Australia an' Fiorderin Meercets*

5.5 ACCESS STRATEGY

Desired Strategic Ootcum
The forderin o' deeper relationschips wi' apt government agencies, Depairtments an' carriers an' the spennin oan caase maakin an' co-operative meercetin campaigns wul heft wi' the keepin' o' strategically important routes alang wi' the forderin o' new direct air an' sea services.

Organisational Airtin
Tourism Airlan wul heft wi' the graith i air an' sea access bae influencin' policy forderin, ective caase maakin wi' carriers an' heftin strategically important routes through co-operative campaigns.

Objective 1: Forder relationschips at wul influence access policy an' route forderin.

Desired Strategic Ootcum

A structured approach hes bein fordered wi' key stakehaulders an' carriers at he shed a guid influence oan route forderin.

Strategy

Tourism Airlan wul mak' baager an' mak' deeper hits relationschips wi' apt Government agencies,depairtments an' carriers tae mak' siccar at route forderin steys a hairtmasist priority owre the cummin thrie yeirs. We wul waark wi' aa stakehaulders tae spake ap fer the forderin o' access tae the islan' o' Airlan.We wul refocus oor resources inby tae pit mair emphasis oan access.

Objective 2: Caase maakin fer route forderin an' houlin oantae gyely important routes.

Desired Ootcum

Sustainable strategic routes hae bein hel' oantaean' mair direct services tae the islan' o' Airlan hae bein fordered.

Strategy

Get loast access beck an' exploit onie gaps i access. We wul gie meercet wittens tae carriers an' tae port authorities tae heft wi' route forderin an' we wul airt aa carriers at sairve hub airports fer tae appen ap langer haul meercets. Tourism Airlan wul mak' betther hits unnerstannin o' o' the fundamentals o' route forderin an' big gap wider unnerstannin o' the issues involved.

Objective 3: Heft wi' promotin' strategically important routes bae co-operative campaigns wi' air an' sea carriers

Desired Ootcum

New an' existin' strategically important routes hae bein generated an' hel' oantae fer the islan' o' Airlan.

Strategy

Tourism Airlan wul cairry oan wi' hits spennin oan co-operative campaigns tae mak' maist o' the forderin o' new an' existin' routes. We wul dae thon bae waarkin i partnairschip wi' carriers oan key strategic routes.

Ection	Daeins	Responsible *					Delivery Dates		
		GB	NA	ME	ADM	Central Team	2011	2012	2013
Forder relationschips At wul influence access policy an' route forderin.	Bigg relationschips wi' apt government agencies depairtments an' carriers tae mak' siccar o' a Coordinated an' structured approach he shed a guid influence oan route forderin. Waark wi' aa stakehaulders tae spake ap fer the forderin o' access tae the islan'.								
Caase maakin fer route forderin an' houlin oantae strategically important routes	Identify gaps ir chansts fer the forderin o' new access an systematically waark wi' pairtners tae heft the forderin o' thae routes. Positivdely mak' a demand fer strategically important an' dhrive incremental business oan thae routes. Forder relationschips wi' the apt airport authorities an' Airlines i owreseas meercets tae heft wi' keepin' an' forderin business. Forder inby expertise an' pit ap resources tae dhrive thon Important airt.								
Heft forderin strategically important routes wi' co-operation Campaigns wi' air an' sea carriers.	Keep ap an' heft existin' services wi' co-operative **co-**funded heftin programmes wi' carriers. Heighlicht ease an' handiness o' direct an' indirect fae US an' Canadian gatewies an' weill linked toons an aa co-operative meercetin programmes. Gae efter pairtnerschip chansts wi' airlines offerain guid connections tae the islan' o' Airlan via Europe								

**Abbreviations GB: Great Britain, NA: Noarth Amerikey, ME: Mainlan' Europe, ADM; Australia an' forderin Meercets.*

5.6 NORLIN AIRLAN STRATEGY

Desired Strategic Ootcum

The deptht an' breadth o' oor daeins wul heft graith i earnins an' visitor an' promotable nummers tae Norlin Airlan. Thon wul bae mair nor Airlan graith. Airtin oan holiday maker nummers we ir airtin aa promotable visitors tae Norlin Airlan tae graw bae a fu' amoont o' +10.8% tae +23.2% owre the thrie yeirs o' the Corporate Plen.

Organisational Airtin

Tourism Airlan wul cairry oan airtin oan getting' premium graith fer Norlin Airlan. We wul mak' siccar at the performance o' Norlin Airlan i oor meercetin campaigns tae dhrive visitor graith.

Objective 1: Airt oan grawin holidaymaaker nummers mainly fae the GB meercet.

Desired Ootcum

Promotable vistors wul hae grew bae +10.8% tae +23.2% owre the thrie yeirs o' the Corporate Plen.

Strategy

Alang wi' encouragin' pas' business tourism visitors tae cum beck fer a holiday trip Tourism Airlan waarkin wi' industry pairtners an' key stakehaulders wul reframe hits communications tae encourage mair holidaymaakers, i particulasr fae GB, tae visit Norlin Airlan owre the cummin thrie yeirs. We wul bring a Norlin Airlan holiday tae lif' bae heftin' distinctive iconic an' engagin' experiences an' we wul gie evidence at thaire ir monie things tae see an' dae quyhles oan holiday i Norlin Airlan . We wul heft Norlin Airlan's nattural beauty an' the freenliness o' hits fowk. We wul leverage St. Pathrick's sennicht tae mak' stranger Norlin Airlan's exposure i GB. We wul stairt forebye a thrade, media an' consumer roadshew i 2011 tae heft an' bigg awareness o' Norlin Airlan es a holiday destination afore the Ttitanic anniversary an' wider Norin Airlan celebebrations i 2012.

Objective 2: Owrecum consumer consairns aboot safetie an' security quyhles i Norlin Airlan.

Desired Ootcum

Consumer notions aboot Norlin Airlan safetie an' security hae carriet oan gettin' betther.

Strategy

Speirins hae shewn at despite a baag bettherment i security an' safetie consumer's notions o' Norlin Airlan hae bein maistly dominated bae bad images o' tims pas'. Tae alther thon notion, tourism Airlan wul waark wi' consairns an' agencies i Norlin Airlan tae forder an' heft new positive content aboot Norlin Airlan includin' film, TV, Screevins an' music. We wul forebye pit freenlie an' welcummin fowk aa the hairt o' oor communications aboot Norlin Airlan. Bae oor wurd o' mooth strategy we wul uise previous visitors' guid holiday experiences tae mak' a 'buzz' aboot Norlin Airlan.

Objective 3: differentiate Norlin Airlan es an unco holiday destination oan the islan' o' Airlan.

Desired Ootcum

The Norlin Airlan brand an' holiday experience gies an' unco an' motivatin' proposition tae potential customers.

Strategy

I oor communications we wul heighlicht at Norlin Airlan offairs a vibrant 'newness' at cannae bae gat i ither Noarth European destinations. We wul heft heirskeip daeins at wul bae hel' i Norlin Airlan i the cummin thrie yeirs, amang thaim the anniversary o' the 'Titanic' i 2012, the worl' Polis an' fire Gaimes an' Derry-Londonderry City o' Heirskeip i 2013 an' the hostin' o' the Clipper Race stapowre i Londonderry tae naime onie a wee wheen. We wul unnerline Norlin Airlan's unco nattur bae ectivly heftin the Signature Projects i oor owreseas campaigns. Owre the tim' o' the Corporate Plen we wul waark wi' the Norlin Airlan Tourist Boord tae identify an' forder new products an' themes at wul heighlicht Norlin Airlan es an unco holiday destination.

Objective 4: The programmin' o' Norlin Airlan through key distributin channels.

Desired Ootcum

The owreaa nummer o' Norlin Airlan products an' packages at can bae gat through key distributin channels hes ris' i key meercets.

Strategy

Tourism Airlan wul cairry oan waarkin wi' traditional an' oanline operators tae mak' siccar at Norlin Airlan bes weill represented oan thair wabsteids an' i thair programmes an at they ir committet tae programmin' Norlin Airlan i the cummin thrie yeirs. We wul waark wi' curn operators tae get thaim tae ris' the programmin' o' Norlin Airlan es pairt o' thair aa-islan' business.

Objective 5: Convince potential visitors at Norlin Airlan bes an easy tae visit destination.

Desired Ootcum

Norlin Airlan bes saen es a place at bes easy tae get tae.

Strategy

I oor communications we wul unnerline at Norlin Airlan bes easy tae get tae bae lan' an' sea tae owrecum consumer notions o' distance an' trevel difficulty. Alang wi' unnerlinin the baag improvements i infrastructure i Norlin Airlan an' the ease o' croass border trevellin, we wul cairry oan focusin' oan forderin an' heftin direct, handy an' competitive access tae Norlin Airlan i key meercets. We wul unnerline the velue at Norlin Airlan giestae potential visitors unnerlinin, quhar hit bes apt, the guid velue oan offair the noo es a sterling economy, an' we wul airt oan maakin siccar at a holiday tae Norlin Airlan bes easy tae beuk fae key distributin channels.

Deliverin oan the Norlin Airlan Strategy

ECTION	DAEINS	RESPONSIBLE*				DELIVERIN DATES		
		GB	NA	ME	ADM	GENERAL TEAM	2011	2012	2013
Airtin oan grawin holiday--maakers tae Norlin Airlan mainly fae GB	Mak' stranger positionin' o' Norlin Airlan es a new an' no tae bae missed destination es pairt o' a visit tae the islan' o' Airlan bae heftin hits beautie, hits no discovered appeal, hits unco heirskeip an' the wairm nattur o' hits fowk. Unnertak a new Norlin Airlan thrade an' media roadshew i 2011 wi'thrade waarkshaps,netwaarkin an' media daeins i key access airts athwort Great Britain tae heft an' bigg exposure fer the the 'Titanic' anniversary an' ither Norlin Airlan celebrations i 2012Theme St'.Pathrick's sennicht daeins i Scotlan' tae mak' maist o' exposure fer Norlin Airlan wi' Scotch thrade, media an' consumers. Set ap a Bilfawst specific programme alang wi' BVCB an' the Norlin Airlan Hotels Federation tae get business visitors tae cum beck fer bye tim' Visits. Cairry oot specific Norlin Airlan hefts i Scotch Airish an' Ulster Scotch meercets i southward US states an' i Canada. Uise resources i oor hairtmaist meercets tae champion the cairryin oot o' the Norlin Airlan strategy athwort aa meercets an big gap links wi' stakehaulders.							
Owrecum consumers Consairns aboot safetie An' security quyhles i Norlin Airlan	Proectively seek oot an' uise chansts tae ris' guid publicity aboot Norlin Airlan es a holiday destination through film, screevins, music an' sib chansts. Waarkin alang wi' Norlin Airlan consairns an' agencies tae forder an' heft guid heirskeip content an' the freenlie nattur o' the fowk bae guid wurd o' mooth communication. Forder specific media iteneries an' stories aroun' key themes eg music, Screevins, film, etc.							
Differentiate Norlin Airlan es an' unco holiday destination oan the islan' o' Airlan	Mak maist o' chansts gien, amang thaim Titanic 2012, Derry/Londonderry UK City o' Heirskeip, Worl' Polis an' Fire Games 2013. Bring Signature Projects tae lif'wi'm heftin o' distinctive iconic experiences at bae unco tae Norlin Airlan. Ris' the Norlin airlan element o' visitin screeveners an' thrade familiarisation Programmes an' mak' siccar tae align visits wi' iconic experiences.							
Ris' the programmin' o' Norlin Airlan bae traditional an' oanline operators	Heft ris' i programmin' o' Norlin Airlan bae bye tim' gowf an business tourism operators. Ettle fer ris' programmin' o' key curn operators tae graw Norlin Airlan shaire o' aa-islan' business.							
Convince potential visitors at Norlin Airlan bes an easy tae get tae destination	Unnerline ease o' gettin' tae Norlin Airlan bae co-operative meercetincampaigns tae heft air an' sea access. Unnerline ease o' access bae Dublin i aa o' oor communications fer Norlin Airlan							

Abbreviations: GB: Great Britain, NA: Noarth Amerikey, ME: Mainlan' Europe, ADM; Australia an' forderin Meercets

7. RESOURCIN' THE PLEN

6.1 Organisational Alignment

Tourism Airlan bes committet tae reponin tae the baag hannlins facin' tourism oan the islan' o' Airlan bae leverin' aa o' hits resources tae dhrive gettin' o' the catter, visitor

an' promotable targets set oot i this Plen. Thon maks hit needfu' fer iz tae realign oor budgets, oor fowk an' oor ettlins agin the sax strategic themes ootlined abeen.

Governance an' Risk

*Tourism Airlan wul uise the heighest stannarts quhan uisin public catter an' i the wie hit daes business.

Mak' maist o' catter

*Tourism Airlan maun harnesh the resources tae han' tae get bes' returns.

Maakin maist o' fowk an' performance

*Teams an' boadies wul bae waarkin acroass meercets an' depairtments raither nor functions an' daeins.
*Hit'll bae needfu' tae owresee altherations wi'in an environment o' less resources.
* We wul bae het aboot gettin' results bae excellence, heigh performance an' the optimum uise o' resources.

Relationschips an' Communications

- We wul waark wi' Failte Airlan, the Norlin Airlan Tourist Boord an' ither pairtners tae get tae oor shaired objectives.
- The Heigh velue o' owreseas tourism tae oor economies wul bae communicated tae oor stakehaulders an' tae fowk aa lairge.
- Wi'in an environment o' ticht catter we wul communicate oor strategy tae oor stakehaulders an' waark wi' thaim tae get the bes' possible ootcums.

OPTIMISIN' RESOURCES

Tourism Airlan kens fu' weill the need fer aa public agencies tae shew velue fer catter i aa airts o' waark, maakin guid owresicht an' uise o' resources needful.

Oor strategy hes identified fower priority meercets – GB, US, Germany an' France quhar Tourism Airlan alloos thair bes maist chanst o' graith an' return oan' spennin owre the nex' thrie yeirs. Meercetin catter wul bae pit oot tae reflect thon priority gien tae thae meercets an' tae heft the ettlins needfu' tae get graith fae thae airts. I ither meercets oor ettlins wul airt oan uisin the meercetin catter tae han'tae get the bes' chansts i the maist effective wie.

Forebye thon Tourism Airlan wul review hoo hit maks bes' uise o' the aptness an' expertise o' thaim at wrocht tae hit tae heft priority meercets an' strategic objectives. Tourism Airlan waarks wi' an' allooed establishment o' 160 poasts i 15 offaices athwort the worl' an' hes General Sales Agents (GSA's) i nine ither kintras. Wi'in thon framewaark Tourism Airlan wul leuk aa new an' betther wies o' waarkin, laike mair collaboration croass meercet an' croass function tae mak' siccar at the organisation hes the skeels an' fowk i rouls an' projects quhar thair bes maist need fer thaim. The mair they wul alloo er suppleness tae repone tae hannlins an' chansts es they cum aboot i tims tae cum.

Tourism Airlan bes committet tae missurin an' reporting oan the aptness o' hits meercetin programmes. Forebye reportin' oan macro missures laike catter, visitor an' promotable nummers, Tourism Airlan wul forder a Return oan Meercetin Spennin

model at wul speir intae gif hits programmes hae the impact wanted aa thrade an' consumer level. The Companie wul uise the ootpits o' sichin a model tae refine programmes o' daeins oan an oangaein basis an' pit catter intae the maist impactfu' daiens.

Tourism Airlan wul cairry oan waarkin tae the heighest levels o' Corporate Governance, maakin siccar at hits codes o' conduct, hits policies,, hits approach tae owresicht o' hannlins an' hits systems o' inby control an' reportin' aa hefts the organisation's ettlin tae gie velue fer catter an' operatin' tae the heighest stannarts adae wi' the uise o' public catter.

OPTIMISIN' FOWK AN' PERFORMANCE

The targets set oot i this Corporate Plen ir challengin' an caa fer heigh levels o' performance. Es the fecht fer tourism shaire gets tae bae iver hairder an' consumer needs cairry oan altherin, Tourism Airlan wul hae tae stey supple, highly skeeled, an' get tae bae mair innovative fer tae get competitive advantage fer the islan' o' Airlan.

Tourism Airlan hes a diverse, highly experience an' skeeled staff. The secon' pairt o' hits plens tae get organisational alignment airts oan maakin betther strategic capabilities bae an' oangaein airtin oan employee lairnin an' forderin, nurturin' innovation bae leverin' employee's knawins an' creativity an' maakin maist o' performance tae dhrive ootcums.

Forebye cairryin oan wi' spennin oan employee trainin' an' forderin i line wi' quhats needfu' fer the business, Tourism Airlan hes cum oan a range o' airts quhar hits needfu' tae big gap capability tae heft this corporate strategy taakin i altheration hannlin skeels, e-business, innovation, negotiatin' an' influencin' skeels, accoont owresicht, strategic PR an' commercial awareness. Forebye thon priority wul bae gien tae the need tae establish inby expertise an' resources tae lead i key strategic airts laike social media an' access forderin.

Tae bield innovation Tourism Airlan wul leuk intae new an' betther wies o' tappin intae the passion an' expertise, energy an notions o' thaim at waark fer hit. Thon wul tak' in identiyin' mair supple wies o' waarkin, mair collaboration an'leukin aa systems tae alloo Tourism Airlan tae assess quaak an' tak' tae meercet new notions an' initiatives.

The Companie's wie o' cummin aa owresicht an' forderin o' performance o' employees wul cairry oan through the performance owresicht an' forderin system at noo bes fu' embedded i the organisation. Thon system maks siccar tae mak' a link atween heigh level organisational objectives an' individual objectives an', oan the basis o' thon trecks progress. Hits intendit tae forder performance owresicht an employee forderin mair bae gien coachin skeels tae line owreseers an' heft thaim tae mak' maist o' the inpit o' aa members o' the team. The airtin wul bae oan heftin excellence an' coachin' fer heigh performance sae the ettlins o' ivry employee can bae maide maist o'.

RELATIONSCHIPS AN' COMMUNICATIONS

Waarkin i partnairschip wi' Failte Airlan an' the Norlin Airlan Tourist Boord an ither agencies an' pairtners forebye bes critical tae the successful bringin' in o' this strategic plen. Fer thon enn Tourism Airlan wul ettle tae mak' siccar o' strang waarkin relationschips aa ivry level wi' colleagues i Failte Airlanan' the Norlin Airlan Tourist Boord i a dhrive tae fire ap an' graw owreseas tourism tae the islan' o' Airlan an tae mak' maist o' resources acroass the thrie organisations.

The velue o' tourism tae the economies o' Norlin Airlan an' Airlan bes baag. I the saime wie the potential impact o' the ections an' decisions o' a nummer o' differ boadies an' agencies forebye the roul played bae individual fowk i maakin betther the visitor experience ir gyely important. Oan accoont o' thon Tourism Airlan wul cairry oot a comprehensive programme fer tae communicate the economic importance o' owreseas tourism tae Governments an' industry stakehaulders.

ECTION	DAEINS	DELIVERY DATES 2011	2012	2013
Maakin maist o' resources	Pit oot catter resources tae heft the airtin oan key worl'wide meercets. Individual suppleness an' mair team daeins wul hae a key roull i maakin siccar o' the deployin' o' talent an' expertise tae projects an' airts quhar thair bes the bes' chanst o' return. Cairry oan maakin betther missurement o' return oan meercet spennin. Cairry oan operatin tae the heighest levels o' Corporate Governance.			
Maakin maist o' fowk an' performance	**Bield Innovation** * Bigg oan an' mak' mair uise o' croass- meercet an' croass-function collaboration. **Spen' oan Employee Lairnin an' Forderin** • Cairry oan spennin oan general employee trainin' an forderin programme i line wi' business needs. • Spen' oan skeels an' knowledge i the airts o' altheration Owresicht, innovation, e-business, negotiatin' an influence Skeels, access, PR (aul farrent an' oan line) an' accoont owresicht. • Stairt inby expertise an' resources tae lead i key strategic airts laike social media an access forderin. **Airtin oan Performance** • Cairry oan uisin the organisation's performance owresicht an' forderin process 'U Perform' • spen oan forderin feedback an' coachin' skeels amang managers tae mak' thaim fit tae mak' maist o' the inpits o' aa employees.			
Relationschips an' Communication	Cairry oan biggin strang waarkin relationschips aa ivry level wi' thaim we waark wi' i Failte Airlan an' the Norlin Airlan Tourist Boord tae realise the fu' potential o' the partnairschip wi' o' waarkin i oor dhrive tae regain an' graw owreseas tourism tae the islan' o' Airlan. En gage i a baag communications programme tae shew the economic importance o' owreseas tourism tae Governments an' industry stakehaulders.			

6.2 BUDGET

The table ablow bes fer purpones o' illustration onie an bes based oan a steady exchange rate o' €1.00 tae £0.82. the table bes based oan a fundin' scenario at wud

gie efficiency savins o' 3%, 6% an' 9% oan 2010 fer the yeirs 2011, 2012 an' 2013, thon bein i line wi' the catter guidelines gien oot.

The notes ir a hairtmaist pairt o' the interpretation o' the illustratin' table

Corporate Plen Budget 2011 – 2103 (Euro)

Fu' Operatin' costs

Pey – Base Line
Operatin'

Net Tourism Airlan Meercetin spen'
Net Meercetin

TI Net Hairtmaist Budget

Fu' Norlin Airlan
Executive Fundin'

Fu' Airish Government
Fundin'

Fu' Amoont

The exchange rate set bae the NSMC bes €1.00 = £ 0.82 (2010 €1.00 = £0.89)

1. **Taakin intae accoont the altherations i exchange rate i 2011 the Norlin Airlan Consolidated Fund wul pit ap £15.323 m sterling tae meet the catter commitments set oot i this plen, at bes a 3% drhap oan the 2010 amoont.**
2. **Airish Government fundin' i 2011 wul bae €47.248, peyed i Euros.**
3. **The fundin' ayont 2011 hasnae bein confirmed yet.**

VELUE FER CATTER:

Throughoot 2009 an' 2010 Tourism Airlan hes leuked fer an' gien the needfu' efficiency savins bae betther procurement an' ither efficiency programmes. Thon airtin wul cairry oan owre the coorse o' 2011 – 2013. Oangaein an' closer waarkin wi' ither agencies oan shaired services tae dhrive baager efficiencies bes plenned. Annex E gies wittens o' Tourism Airlan's Efficiency Savins Delivery Plen.

8. MISSURIN OOR SUCCESS

Tourism Airlan bes committet tae speirin intae the cairryin oot o' this plen an tae the missurement ' hits impact. The plen describes the ootcums we ir mindit tae deliver tae the enn o' 2013 i terms o' macro missures including visitor an' catter graith an'

performance missures amang thaim visitor intentions. We ir mindit tae accoont fer oor performance bae formal missurement an' evaluation.

Based oan the fundin' gat fae oor sponsorin' Government Depairtments thair ir twa pairts Tae missurin the impact o' oor plen:

1. maakin the bes' uise o' the resource tae han' acroass the key target meercets an audiences.
2. Maakin siccar at oor peercetin programmes ir haein the impact expectit.

Tourism Airlan wul uise an explicit 'Resource Allocation Model' tae mak siccar at resources o' catter an' fowk ir airted aa the bes' prospect geographies an' target meercets. Biggin oan oor success wi' campaign level evaluation Key Performance Indicators an' organisation level SMART objectives we ir committin tae explicit eveluation o' the baag pairts o' oor programme owre the plennin tim'.

Missurin the impact an success o' the Corporate Plen wul bae a yeirly joab an' wul bae reported i the Tourism Airlan Yeirly Report, the mair hit'l bae shewn i oor roulin strategic plens..The resource allocation model tae bae uised bae Tourism Airlan wul cairry oan rankin' meercets an' target curns i terms o' attractiveness an' accessibility, sae es tae airt oor resources i the bes' wie. We hae a weill-fordered daeins monitorin' system at we wul bae maakin baager tae cover aa o' oor campaigns an' initiatives.

9. **ENN**

   Tourism bes yin o' the baagest hame grew sustainable pairts o' the kintra an' airt economies o' the islan' o' Airlan. A cummin beck intae graith fer tourism bes needfu' fer the economic rejuvenation o' the islan' o' Airlan oan a wheen o' differ levels economically, socially, spatially an' i terms o' heirskeip.

The worl'wide economic hannlin, the impact o' the volcanic ash an' the loass o' air access hev hed the ootcum o' a baag contraction o' the tourism sector i the pas' thrie yeirs. We alloo at the cummin thrie yeirs wul bae haird es catter graith i oor key source meercets wul bae slae an' tourism tae the islan' o' Airlan wul hae tae get owre a clatter o' hannlins gif hits tae get beck intae graith.

Hooiniver Tourism Airlan alloos that implementin' an apt strategy can hae the ootcum o' a return tae graith i catter an' nummers o' visitors an' promotable visitors i 2011. Gif hit bes carriet oot i fu' this Corporate Plen wul see atween 21.1 million an' 22.2 million visitors an' atween 9.1 million an' 9.7 promotable visitors bein welcumed tae the islan' o' Airlan owre the nex' thrie yeirs generatin' atween €10.3 billion an' €10.8 billion/£8.4 tae £8.9 billion. Oor committent tae thon targets hes bein infoarmed bae the strategic tourism reviews i Norlin Airlan an' Airlan.

Tourism Airlan wul get tae thae targets bae airtin oan cairryin oot an deliverin' oan the sax strategic themes ootlined i this plen. I maakin readie the plen Tourism Airlan hes maide sum haird bit infoarmed chuses at wul ahe the ootcum o' a baager airtin oan priority meercets an' key target consumer curns.

Tourism Airlan bes a lairnin organisation an' bes committet tae missurin the impact o' this plen oan the forderin o' the tourism sectorReportin' oor successes, hannlins an' lairnins wul bae affen an' transparent.

We alloo at the targets set oot i this plen wul bae haird tae hit. We 'gree at we wul onie bae fit tae meet thae targets bae taakin oan new mintit an consumer airted wies o' waarkin i aa oor daeins. We alloo at the success o' the Corporate Plen depends wholly oan the oangaein pairtnerschip wi' the tourism industry an' aa o' oor stakehaulders an' wul waark thegither tae mak' siccar at thon cummin beck intae graith bes achieved.

Caase Study 1: An An airtin oan GB

GREAT BRITAIN – FAA I MEERCET SINE 2007

Quyhles thair wus a wee bit graith i owreaa GB visitors tae the islan' o' Airlan ap tae 2007, the mair at thair wus oangaein meercet spennin , British holidaymaakers hanae shewn oangaein graith tae the islan' o' Airlan sine 2002 an shewed baag faas Ii 2008 an mair sae i 2009. This pairt rttles tae shew the raisons fer the puir performance o' thon key meercet.

TRENDS IN BRITISH VISITORS TAE THE ISLAN' O' AIRLAN 2002 TAE 2009

GB VISITORS

GB HOLIDAYMAAKERS

THE OWREAA GB HOLIDAY MEERCET

Airtin oan holidaymaakers hits clear at the GB ootbound meercet hes bein stagnatin' worl'wide fer a wheen o' yeirs.Thair wus neir no graith i British holidaytrips tae Europe atween 2005 an' 2008an' a faa i 2009. Hame holidays hae shewn a gyely differ pattern faa'in fer maist o' the ten yeirs tae 2008, then haein strang graith i 2009 (5).

Forecastin' experts alloo at the main factors affectin' trends i holiday trevel fae onie meercet tae bae GDP, levels o' idleness, disposable catter, consumer confidence, exchange rates an' access capacity. The table ablow heighlichts the faa i 2008 an' 2009 at hae fed intae the general faa i outbound holidays fae Great Britain

Ectual GDP *(UK ONS)*

Ectual DisposibleCatter

Idleness *(UK ONS)*

Consumer Confidence *(Nationwide Index)*

The strenght ir waikness o' the pun agin the euro hes wi'oot doot an impact oan Britons' holiday decisions, wi' holidays tae euro airt kintras joinin tae drap i 2008 es sterlin' loast velue an' then shewin *ectual* faas i 2009(6). I 2009 the ootboun destinations favourit bae Britons laike Egypt an' Turkey wur apt tae hae waiker locail currencies agin sterlin. Hooiniver the baag winners wur hame destinations, wha efter a wheen o' yeirs o' faa saen a cum beck i popularity at hes carriet oan intae 2010.

5.Source fer hame holidays bes the UKTS
6. Es pairt o' the UK sterlin' fluctuations didnae impact oan Britons taakin holidays i Norlin Airlan

INDEXED TRENDS I BRITISH HOLIDAYS 2005 TAE 2009

_____ GB tae Europe
GB tae Islan' o' Airlan
GB Hame

_____avg velue o' £1 i €

FAICTORS SPECIFIC TAE THE ISLAN O' AIRLAN

Atween 2001 an' 2007 the island o' Airlan's shaire o' British trips tae Europe wus middlin steady, sim yeirs grawin a wee aheid o' ither European destinations an' faa'in ahin a wee i ither yeirs. I 2008 an' 2009 hooiniver, the mair at the outbound meercet drapped, thaire wus a shairper faa i holidays tae the islan' o' Airlan, meanin' a loass o' shaire fae %4.1 i 2007 tae 3.1% i 2009. summed ap ablow ir a wheen o' faictors specific tae the island' o' Airlan at hae fed intae thon faa.

Air access faas: Es an islan' destination the link atween available air access an' visitor nummers bes gyely important. Quyhles the netwaark o' flichts tae the islan' o' Airlan bes gye strang yet fae GB shairp sneds bae carriers wur furst maide i Wunter 08/09 (-8%) an' thon wus maide wor bae mair sneds i ivry follaein saison (Simmer 2009 -13%, Wunter 09/10 -13%, Simmer 2010 -5%) thon hes the ootcum at onie fower fifths o' airplane seats wur tae bae hed i the wunter o' 2009 tae 2010fer potential visitors fae GB compeered tae the wunter twa yeirs sine.
Negative buzz aboot price: Buzz aboot Airlan bein' a dear destination stairted appearin' i Great Britain i 2008 an' wus captured bae faa'in ratins i oor yeirly Brand Tracker Survey. Thon wus fuelled bae the sterling tae euro exchange rate forebye stie comparative inflation i Airlan i the Celtic Tiger yeirs. Es the recession joined tae hit hame sair i GB we hae saen price an' velue move ap i importance fer holiday destination chuses an, i ectual terms, the velue o' £1 i Airlan fell fae €1.46 i 2005 tae €1.07 i 2009. wurd o' mooth hes fuelled thon buzz the mair, i 2009 41% o' British holidaymaakers tae airlan naimed the heigh cost o' leein es a hannlin, quyhles a thurd wurnae satisfied wi' velue fer catter oan thair holiday.

Want o' differentiation agin hame destinations: Es velue fae a holiday hes ris' i importance sae hes the importance o' a differ ir unco holiday experience. Speirins hae shewn at oor target meercet i GB wul pey mair quhar difference baes saen. The noo the islan' o' Airlan bes saen es a wee thing owre neir tae hame i experience an' offairin bit wantin' the functional advantage s o' bein connectit tae GB bae lan.

Speirins alloo at the island o' Airlan isnae differentiated fae GB destinations. Biggin ap thon differ bes a key pairt o' oor meercetin strategy i GB fer tims tae cum.
Waefu' weather i GB Mair nor ordnar rain an' cauld tims i Great Britain an' Airlan owre the pas' twa yeirs havnae gien British fowk the notion o' a holiday tae the islan' o' Airlan es they leuk aa gettin' awa fae 'recession depression'. Destinations gainin' shaire ir thaim offerain velue ir sinnshine ir baith. I Janwerry 2010, fer example, the gye cauld weather i airlan an Britain meant the shuttin o' airports es the wor' weather fer 50 yeirs grippit the kintra wi' snaw an' ice.
Loass o' shaire o' voice: Ridin' oan the beck o' the grawin trend i hame holidays, domestic destinations i GB hae brcht in gyely aggressive meercetin strategies, becked wi' mich catter. I spite o' mair spennin the islan' o' Airlan hes saen a baag loass i shaire o' voice i GB agin key hame competitiors.
New consairns aboot safetie an' security i Norlin Airlan Efter a trend o' a betther image o' Airlan an' Norlin Airlan es a safe an' secure destination 2010 saen a step beck. Thon wus likely spairked bae publicity aboot a graith i dissident terrorist daeins i Norlin Airlan.

Twa key implications tae dhrive graith cum fae thon. Firstly heftin an' unco, compellin' an' motivatin' message at maks siccar at the destination bes saen es a gyely differ experience tae GB hame holiday chuses. Secon'ly tae mak' siccar at consumers can fin' guid velue fer catter quhan trevellin tae an' steyin oan the islan' o' Airlan.

Through a baag suite o' meercetin daeins we wul cairry oan shewin the altheration an' positivity i Norlin Airlan tae unnerlinethe differ experience Norlin Airlan offairs agin a holiday i Inglan, Scotlan' an' Wales.

Keepin ap an, quhar hits possible, risin access tae the islan' o' Airlan wul bae key tae graith forebye. Tourism Airlan wul gie a han' wi' grawin air an' sea access bae influencin' Government policie. Ective caase maakin wi' carriers an' heftin strategica;;y important routes wi' co-operative campaigns.

CAASE STUDY 2: AN AIRTIN OAN CHANNELS

Key Insichts

- The inthernet carries oan grawin wi' the ootcum o' new communication an' distribution channels at ir taakin a quaak grawin shaire o' the meercet.
- Hooiniver traditional channels ir important yet an accoont fer aboot hauf o' aa demand an' noo hae the added dimension o' bein fit tae bae gat oanline forebye affline.
- Ivryday fowk foarm notions aboot brands fae touch points, amang thaim advertisements, news reports an' collouges, motivatin fowk tae consider the islan' o' Airlan i the furst place, afore leukin aa the wittens sources at influence chuses, plennin an' beukin.
- A key challenge bes tae wrocht oot the bes' wie tae leverage baith oanline an' traditional channels wi'in the owreaa meercetin strategy, allocatin resources tae get bes' return.

- Tourism Airlan hes pit oot hits meercetin spen' in-line wi' thae channels at ir resonatin' bes' wi' consumers quyhles persuin' a bes' velue media approach.

Technological forderins owre the pas' 10 yeirs hae led tae a baag shift i the wie fowk research., plen an' buy trevel an' tourism. Inthernet uise hes exploded an bes set tae graw exponentially i tims tae cum. A wrocht oot 2 billion (7) fowk ir noo oanline worl'wide, wit revel bein yin o' the maist searched airts oan the internet. Thon shift hes challenged traditional channels an he shed the ootcum o' a proliferation o' new communication an' distribution channels, amang thaim wabsteids, oanline trevel agents an' tour operators, social media sichts oanline communities an' intherective reviewer sichts, search engines an' ither applications.

Evolin' Structures o' Distrubution Channels

A recent ITIC report, *Tourism and Travel Distrubution in a Changed World* heighlichts baag altherations i distribution channels an' maks sax fundamental observations aboot the evolving structure o' distribution channels.

1) Traditional channels o' distrubutin ir important yet maistly aa the B2B level bit mair uise bes bein maide o' the internet es a wie o' communicatin.
2) Consumers ir apt tae mak' mair uise o' trevel agents an' tour operators quhan buyin'complex products ir trevellin tae far aff destinations.
3) OTA sir the quaakest grawin distrubutin channel an' hae gat baag meercet shaire. They ir airted tae gie consumers wi' access tae laugher prices, comparative pricin' an' personalised an' comprehensive product wittens.

_____-

Source InternetWorldStats.com

4) direct sales bae suppliers tae consumers ir the baagest shaire o' oanline sales accoontin fer aboot 70% o' oanline ticket sales an' 70% (US) tae 80% (EU) o' oanline car hire sales, faa'in tae 59%(US) an' 42%(EU) i the caase o' hotels quhar OTAs hae a baag pairt o' thon meercet
5) Oanline sales hae bein maist successful quhar price bes the primary dhriver o' chuses
6) The evolin' oanline tourism an' trevel distribution industry bes mairked bae consolidation an' fragmentation aa the saime tim'

Distrubution Channels aa a Gleek

Suppliers

Carriers (Air/Sea/Rail etc
Lodgin' (Hotels/B&Bs/Self Caterin' etc
Car Rentin'
Ither

Object

Oanline

- Brand Wabsteid
- Epoast
- Inthernet Bookin' Engine
- Mobile

- Social Media

Oanline
- Pegasus
- ODD
- Ootby

Affline
- GDS (Amadeus/Sabre/Galileo/World Span)
- Voice (Caa Centres)

Affline
Incummin Tour Operators

Oanline
- OTAs (Expedia, Orbitz, Travelocity, etc)
- Tour Operators

Enn Uisers
Consumer Tourist Meercets
Corporate
Ither Trevellers

Source: CHL/Amas report oan baehauf o' ITIC 2010

The report alloos at quyhles affline channels accoont yet fer a baag shaire o' owreaa demand-maakin ap hauf o' bookins i Airlan i 2009 – thair bes clatters o' evidence shewin hoo oanline channels ir taakin a quaak risin shaire o' the meercet, Fer Example, European oanline bookins fer bye tim' an' non owresaen business trevel grew bae aboot 20% i 2008 compeered tae onie 3% fer the owreaa industry hitsel, quyhles the affline trevel industry hasnae grew sine 2002. I 2008, sim 80% o' thaim visitin' Airlan bocht sim pairt o' thair trip oan the inthernet.
The report alloos at i baith the US an European meercets oanline demand wul cairry oan risin agin affline demand. Oan accoont o' demographic altherations an' mair braidban penetration thon trend bes expectit tae get mair stie.

Channel Uise i Key Source Meercets

Consumers uise an' ir influenced bae a wheen o' channels i the coorse o' the consumer journey, fae speirins an' plennin through tae booking, wi' speirins shewin the oangaein importance o' baith oanline an' affline channels i oor key source meercets.

Adwice fae cronie, freen ir business associate
The Inthernet
Steerin Beuks
Films ir Movies
Ither Heftin Paipers oan Airlan
Erticles i Newspaipers ir Magazines
Ither Tourist Boord Paipers
Trevel agent
Trevel shew oan TV ir Wireless
Advertisin' fer Airlan

Source Failte Airlan Visitor Attitude Speirin 2009

Wurd o' Mooth an' the Inthernet

Accordain tae Failte Airlan Visitor Attitude Speirin wurd o' mooth bes yet the nummer yin source o' wittens influencin' chuse o' Airlan es a destination (51%) follaed bae the Inthernet (48%) i 2009. Hooiniver variations ir clear athwort oor key source meercets, wi' the inthernet o' maist importance i Great Britain aa 54% follaed bae wurd o' mooth aa 43%. Thon ordair wus the ither wie aroun' i the United States, Germany an' France wi' wurd o' mooth bein' mair important (54% 52% an' 56% respectively, wi the inthernet cummin i secon' aa 48%, 36% an' 43% respectively. Hit follaes fae thon at hits important fer Tourism Airlan tae influence thae consumer driv' touch points. Tourism Airlan's Corporate Plen fer 2011 – 2013 shews the grawin importance o' wurd o' mooth an' bes bringin oot a strategy at wul airt oan forderin wurd o' mooth campaigns.

Traditional Channels

Traditional sources o' wittens ir middlin' important yet i Germany compeered tae the owreaa average, amang thaim Steerin Beuks (3)%) films an' heftin paipers oan Airlan (22% each), erticles i newspaipers/magazines (21%) an' TV/Wireless (20%). Steerin Beuks ir relatively o' mair importance fer US an' French visitors (30% an' 27% respectively) wi' US visitors mair apt forebye tae cite trevel agents (15%) es an important source o' wittens. The trend tae uise tourism specialists bes stranger amang holiday maakers i particular i the US meercet, than VFR an' business trevellers.

The Norlin Airlan Tourist Boord Visitor Attitude Survey shewed the importance o' the inthernet es a source o' wittens quhan plennin an' beukin' a trip tae Norlin Airlan an' hit bes notable at the NITB an' Tourism Airlan sichts ir the maist uised wabsteids owreaa(8). Remairkably, quyhles oanline reviews wur maist important quhan visitors wur chusin thair owrenicht lodgins, getting mair general notions aboot quhat tae dae an' chusin places tae visit, they played less o' a roul quhan visitors wur chusin tae visit Norlin Airlan ir no.

Hit maun bae saen at thae sources o' wittens at influence chusin' plennin' an' beukin irnae the saime sources at get fowk tae consider the islan' o' Airlan i the furst place. Ivry day fowk tak' notions aboot brands fae touch points laike advertisements, news reports, collouges an' product experiences stimulatin' knawin an' promptin includin' i the furst considerin' set afore the ective-evaluation-phase.

Implications fer Meercetin the islan' o' Airlan

Thae channel forderins gie baith chansts an challenges fer the meercetin an' heftin o' the islan' o' Airlan. Es a pouerfu meercetin tool, enrichin' the meercetin mix oanline channels gie a chanst tae touch mair consumers worl'wide wi' mair effect an' wi' richer, content driv' airted messages aa less cost. The mair, es heighlichted i the ITIC report, traditional influences, amang thaim wurd o' mooth, traditional advertising, films ir co-operative meercetin initiatives hae the added dimension the noo o' bein available oanline forebye affline, wi onie nummer o' combinations o' oanline, affline, direct an' indirect channels. Wurd o' mooth hes noo gane viral wi' a worl'wide reach heighlichtin at hit bes needfu' tae influence consumer driv' touch points oanline. A key challenge tae wrocht oot the bes' wie tae leverage baith oanline an' traditional channels wi'in the owreaa meercetin strategy, allocatin' resources tae gie the bes' return.

Future trends alloo at oanline wul cairry oan grawin i importance wi' the inthernet drivin'popular an' emergin' media channels an' points o' contact wi' consumers, amang thaim TV an' mobile phone. Thae channels gie the chanst fer the islan' o' Airlan tae engage mair effectively wi' consumers an' get mair interactivity atween thaim an' Brand Airlan. Fae a brandin' perspective, Accordain tae the Razorfish Digital Brand Experience Survey 2009, digital experiences irnae onie aboot knawin ir' conversion bit ir fit tae mak' (ir brek)

customers. 65% o' US customers alloo at they hed a digital experience at positively ir negatively althered thair notion aboot a brand. The study foun' at brands at uise digital tae drive awareness drive sellin' forebye: 64% o' consumers alloo at they maide a furst purchase o' a brand oan accoont o' a digitial experience.

Tourism Airlan Advertisin' Spennin 2010

Tourism Airlan hes pit oot hits meercetin' spennin in-line wi' the channels at ir resonatin' bes' wi' consumers quyhles ectivly persuin a be's-velue media approach.

(8) amang ither popular wabsteids wur carrier ir accommodation wabsteid, map wabsteid, Tripadvisor.com, hotel chain wabsteid, Hotels.com an' lastminute.com

Tourism Airlan meercetin spennin bae channel

E-Meercetin

Trevel thrade advertisin' an' daeins

TV advertisin'

Wireless advertisin'

Publicity

Heftin paipers oan Airlan

Consumer heftins

Prent advertising

Consumer contact centre

Oot o' Hame Advertisin'

Source: Tourism Airlan

E-meercetiin an' the Contact Centre: Tourism Airlan hes ris' hits spennin oan e-meercetin alang wi' the graith o' the inthernet es a key source o' holiday plennin an wittens an an influence i chusin destination. Es wurd o' mooth steys the nummer yin source o' wittens wi' an influence oan chusin' the islan' o' Airlan es a destination we hae rin campaigns at heft wurd o' mooth referrals an' ris' the resource i oor contact centre dedicated tae social media engagement an' monitorin'

Trevel Thrade Advertisin an' Daeins: quyhles consumers ir mair apt tae buy trevel products independently , the trevel thrade bes yet an important interfaice atween possible visitors an' the islan' o' Airlan product , mair sae i mair traditional meercets. We cairry oot co-operative meercetinwi' baith oan an' affline thrade tae capitalise oan the grawin importance o' oanline tour operators an' cairry oan reachin' consumers wha need faice tae faice expert consultation quhan chusin a holiday.

TV Advertisin: TV advertising alloos Tourism Airlan tae shew the emotive aspects o' oor brand tae oor target audience i a rich an' vibrant wie. Oan accoont o' hits effectiveness hit carries oan ectin es oor main communication channel i key source meercets.

Wireless Advertisin: Wireless advertisin' shews the aural nattur o' the Tourism Airlan brand an' es thaim at lissen tae wireless ir apt tae bae loyal tae particular stations they ir apt tae

forebye tae repone tae the advertisin' quyhles bein gyely targeted i terms o' demographic an' tastes.
Publicity: Tourism Airlan hes a weill waarkin publicity programme i place at alloos the islan' o' Airlan tae get a furst cless return oan spennin i terms o' wrocht oot advertising velue. Ournalist an' press curn visits tae the islan'o' Airlan, media newsscreeds an' releases, an' media breifins an' PR daeins aa gie mich publicity tae the islan' o' Airlan.
Brochures an' Heftin Paipers: Alang wi' oanline doonloads o' key publications, Tourism Airlan gies consumers affline sources o' wittens. Heftin paipers oan the islan' o' Airlan bes a key source o' wittens i monie o' oor meercets, i particular Germany.
Consumer Heftins: Airted heigh profile consumer heftins hae baag fitfaa an' alloo Tourism Airlan tae facilitate faice tae faice chansts atween the thrade an' the consumer. We hae shifted oor airtin fae trevel hefts tae lif'style heftins at gie the islan' o' Airlan visability i relevant' yet surprisin', consumer locations.
Prent Advertisin
Tourism Airlan hes sned hits prent advertising oan accoont o' thon channel bein' outpaced bae oanline advertising. Generic trevel advertisin' isnae es relevant wi' the consumer, hooiniver airted editorial alang wi' advertisements brings the destination tae lif' fer the consumer.
Oot o' Hame Advertisin'
Oot o' hame advertisin' played a baag pairt i oor sprang advertising campaigns the yeir wi' 'Gae Quhar Airlan Taks Ye' advertising prominently displayed oan buses an, aa bus staps drawin' consumer attention acroass oor meercets. The St' Pathrick's sennicht campaigns aa Great Britaiin train stations, the Titanic exhibition i New York an' guerrilla meercetin athwort ither meercets grew publicity fer Tourism Brand Airlan.

CAASE STUDY 3: AN AIRTIN OAN ACCESS

Air capacity tae the islan' o' Airlan wus aa hits hecht i 2008 wi' neir 500,000 yin wie seats tae bae hed ivry sennicht, wi' mair nor hauf o' thaim cummin fae Great Britain. The ris' i air services ap tae an' taakin i 2008 wus the ootcum o' the needs o' the vibrant islan' economy driv bae a strang ootboun' meercet, mair international (inboun') demand, the liberalisin' o' flicht meercets, graith i laigh cost airline services an' a grawin international; air netwaark. Owre the tim' 2004 – 2008 air capacity fae Great Britain grew bae +29%, Noarth Amerikey bae +57% an' Mainlan' Europe saw an explosion o' +140% i air capacity.

Sine 2008 Great Britain he shed a mairked faa i capacity, (-17%). Efter yeirs o' quaak graith Mainlan' Europe he shed a -10% faa i capacity sine 2008. Noarth Amerikey capacity wus aa hits heicht i the simmer o'2007 wi' neir 40,000 yin wie seats oan offair ivry sennicht compeered tae just owre 28,000 fer simmer 2010 (a faa o' -28%).

<u>Summin ap o' air access capacity (Yin wie seat capacity tae bae hed ivry sennicht) fer simmer 2010 agin the peak simmer o' 2008 fer the islan' o' Airlan</u>

- Fu' amoont tae the islan' o' Airlan 498,510 v 424,688 (-15%)
- Great Britain 268,644 v 223,143 (-17%)
- Mainlan' Europe 190,726 v 170,711 (-10%)
- Noarth Amerikey 39,140* v 28,214 (-28%)

*Simmer 2007 figure uised es Noarth Amerikey air access capacity tae the islan' o' Airlan peaked i simmer 2007 quyhles the peak fer ither meercets wus 2008.

Yin wie seat capacity per sennicht tae the islan' o' Airlan fer Simmer 2004 -2010

Fu' Amoont

_____ GB

_____ Mainlan' Europe

NA

Simmer Capacity

Adae wi' ferry services, car space capacity oan offair tae the islan' o' Airlan fer simmer 2010 wus 59,500 spaces agin 72,675 spaces i 2004, a faa o' -20% . (Thon faa wus atween 2004-2007- capacity hes steyed stable sine simmer 2007).

Hits thocht at owre the tim' o' this Corporate Plen, the islan' o' Airlan wul hae a slae economic recovery. Thae ir encouragin' signs an' the latest forecasts ir fer fair GDP graith oan the islan' nex' yeir, risin' i 2012. Yinst the signs o' an economic recovery can bae saen uplif' i air capacity bes expectit. Aer Lingus hae allooed at they expect demand tae stay puir intae nex' yeir an' sae wul keep the saime capacity intae 2011 bit ir appen tae revise capacity plans gif the meercet gets betther bae simmer 2011.

Aamang hannlins facin air access capacity tae the islan' o' Airlan ir the likelihood o' air fares tae gae ap i the short tae medium tim' es airlines gae efter heigher yields, possible rises tae oil prices, possible carbon based taxes an' consolidation i the airline sectormicht impact forebye oan air access tae the islan' o' Airlan i the plennin' tim'.

I the plennin' tim' fae 2011 tae 2013, Tourism Airlan alloos hit'lll hae an expansion o' hits ective programmes o' caase maakin fer route forderin/extention an' the heftin o' strategically important routes bae co-operative meercetin campaigns wi' carriers.

APPENDIX 1: SUMMIN AP O' ISLAN' O' AIRLAN VISITOR, PROMOTABLE VISITOR AN' CATTER FORECAiST SCENARIOS 2010 - 2013

Islan' o' Airlan Visitor Scenario 2010 – 2013*

Laigher range forecaist

Medium range forecaist

Apper range forecaist

*Forecast based oan Tourism Economics Model **CAGR = Compound Yeirly Graith Rate

ISLAN O' AIRLAN PROMOTABLE VISITOR FORECAiST SCENARIO 2010 -2013*

Laigher range forecaist

Medium range forecaist

Apper range forecaist

*Forecast based oan tourism Economics Model **CAGR = Compound Yeirly Graith Rate

Islan' o' Airlan Catter Forecaist Scenario 2010 – 2013*

Laigher range forecast (€mn)
Laigher range forecast (£mn)

Medium tange forecast (€mn)
Medium range forecast (£mn)

Apper range forecast (€mn)
Apper range forecast (£mn)

*Forecast based oan Tourism Economics Model **CAGR = Compound Yeirly Graith Rate

Hits tae bae noted at catter forecastin' i the day's worl' climate bes challengin' an' shud bae treated wi' an' apt level o' caution bae the raider.

APPENDIX 2: VISITOR,PROMOTABLE VISITOR AN' CATTER TARGETS 2011 – 2013

Owreseas Visitor Targets 2011 – 2013*

Airlan

Norlin Airlan

Great Britain

Mainlan' Europe

Noarth Amerikey

Ither Airts

Targets wul bae althered based oan final 2010 ootturn ** Forecast based oan Tourism Economics Model

Owreseas Visitor Targets 2011 – 2013*

Airlan

Norlin Airlan

Great Britain

Mainlan' Europe

Noarth Amerikey

Ither Airts

*Targets wul bae althered based oan final 2010 ootturn **Forecaist based oan Tourism Economics Model

Promotable Visitor Targets 2011 – 2013*

Airlan

Norlin Airlan

Great Britain

Mainlan' Europe

Noarth Amerikey

Ither Airts

Targets wul bae althered based oan the final 2010 ootrin ** forecaist based oan Tourism Economics Model

Promotable Visitor Targets 2011 – 2013

Airlan

Norlin Airlan

Great Britain

Mainlan' Europe

Noarth Amerikey

Ither Airts

*Targets wul bae althered based oan the final 2010 ootrin **CAGR = Compound Yeirly Graith Rate

Catter Targets 2011 – 2013 (Euro)*

Airlan

Norlin Airlan

Great Britain

Mainlan' Europe

Noarth Amerikey

Ither Airts

*Targets wul bae althered based oan the fina;l 2010 ootturn **Forecaist based oan Tourism Economics Model
***CAGR = Compound Yeirly Graith Rate

Catter Targets 2011 – 2013 (Sterling)*

Airlan

Norlin Airlan

Great Britain

Mainlan' Europe

Noarth Amerikey

Ither Airts

*Targets wul bae althered based oan the final 2010 ootturn **Forecaists based oan the Tourism Economics Model
***CAGR = Compound Yeirly Graith Rate Note: Exchange Rate uised bes €1 = £0.82

Hits tae bae noted at catter forecaistin i the day's worl'climate bes challengin' an' shud bae treated wi' an apt level o' caution bae the raider.

APPENDIX 3: EFFICIENCY SAVINS DELIVERY PLEN (ANNEX E)

NOARTH/SOOTH BOADIE; Tourism Airlan Ltd

This delivery plen outlines the missures at Tourism Airlan Ltd wul cairry oot tae achieve hits target savins fer 2011 – 2013.

Efficiency Programme

The Boadie wul hae fu' efficiencies o' **£',ooos/€',000s** fae 2011 – 2013 es shewn i the Fu' Efficiency Table ablow:

Sterling

	Fu' Efficiency Targets (3% per yeir 9% Cumulative)	Baseline an' Fu' Efficiencies	2011 Efficiency Savins	2012 Efficiency Savins (Cumulative)	2013 Efficiency (Cumulative)
Baseline (2010 approved budget)					
Fu' Efficiencies Needfu'					

Euro

	Fu' Efficiency Targets (3% per yeir 9% Cumulative)	Baseline an' Fu' Efficiencies	2011 Efficiency Savins	2012 Efficiency Savins (Cumulative)	2013 Efficiency (Cumulative)
Baseline (2010 approved budget)					
Fu' Efficiencies Needfu'					

The airts at hae bein targeted es a wie o' realisin' catter releasin' efficiencies ir summed ap i the furst column o' the tableablow an' the monitorin' arrangements an' missures at wul bae pit intae place tae mak' siccar at efficiency savins ir maide wi'oot impactin' oan targets an' service delivery ir ootlined i the las' column.

EFFICIENCY PROGRAMME SUMMARY TABLE – exchange rate uised throughoot fer plennin purpones - €1 = £0.82

Sterling Euro

2011 Savins	2011 Savins	Responsible Offaicer	Monitorin' arrangements/missures tae mak siccar forecaist level o' savins ir maide wi'oot a waefu Impact oan priority services
(a) Admin		Meercet owreseers/ Senior Owresicht Team/CEO	Savins oan the administration budget wul bae gat bae renegotiatin' a wheen o' leases oan Tourism Airlan's owreseas offaice netwaark. Aa staff trevel bes bein' leuked aa tae mak siccar at onie needfu' trevel bes unnertuk an' i thae cases the maist cost effective wie o' Trevellin bes uised. Vi8deo Conferencin' bes bein' uised quhar hits fittin' an the companie bes uisin Government owned biggins fer maetins/conferences quhar possible. Offaice services laike buyin' newspaipers an' uise o' couriers hes bein sned. New contracts fer wab hostin' an' the gien o' data lines hae hed the ootcum o' savins.
			Ivry Depairtmental owreseer wul bae responsible fer sneddin costs i thair airts laike T an' S. Monthtly reports wul bae maide fer ivry main meercet manager tae mak' siccar at the sned spendin' targets unner differ clesses ir bein' met. A summin' ap o' thae reports wul bae gien ivry thrie monthts tae the senior owresicht team an' tae the Heigh Heidyin.
(b) Resource		Meercet owreseers/ Senior Owresicht Team, CEO	Adae wi' the meercetin budget betther rates hae bein gat fer buyin' advertisin' space oan wireless, televeesion an' prent oan accoont o' the worl'wide doonward trend i the price o' advertisin', the mair, the companie hes gat a betther rate fae hits main advertisin' agency efter re-negotiatin'.
			The Heidyin o' Meercetin Communications bes leukin intae the sales an' prices fae buyin' advertisin' an' compeerin' thaim tae las' yeir's rates an' the advertisin' meercet. Ivry montht reports wul bae maide bae ivry meercet manager tae mak' siccar at the sned spendin' targets unner differ heids ir bein' stuck tae. A summin ap o' thae reports wul bae gien ivry thrie monthts tae the senior management team an' tae the Heigh Heidyin.

Fu' Savins

Savins – Norlin
Airlan inpit

Savins- Airish
Inpit

The airts at hae bein targeted es a wie o' realisin' cash, releasin' efficiencies ir summed ap i the furst column o' the table ablow an' the monitorin' arrangements an' missures at wul bae pit intae place tae mak' siccar of efficiency savins ir gien wi'oot haein a waefu impact oan targets an' service gien ir ootlined i the las' column.

EFFICIENCY PROGRAMME SUMMARY TABLE – exchange rate uised throughoot fer plennin purpones bes €1 = £0.82

Sterling Euro

2012 Savins	2012 Savins	Responsible Officer	Monitorin' arrangements/missures tae mak siccar at forecast amoont o' savins ir gien wi'oot a waefu Impact oan priority services.
(a) Admin		Meercet owreseers/ Senior Owresicht Team/ Heigh Heidyin	Savins oan the administration budget wul bae maide bae renegotiatin' a wheen o' leases oan Tourism Airlan's owreseas offaice netwaark. Aa staff trevel bes bein speired intae tae mak' siccar at onie needfu' trevel bes unnertuk' an' i thae caases at the maist cost effective wie o' transport bes uised. Video confernecin bes bein' uised quhar apt an' the companie bes uisin Government owned biggins fer maetins/conferences quhar Possible. Office services laike buyin' newspaipers an' uise o' Couriers hes bein sned. New contracts fer wab hostin' an' the Giemn o' data lines hae hed the ootcum o' savins. Depairtment owreseers wul bae responsible fer sneddin costs i thair airts sich es TAS. Reports wul bae maide ivry montht fer ivry main meercet manager tae mak' siccar at the sned spendin' targets unner differ heids ir bein met. A summin' ap o' thae reports wul bae gien ivry thrie monthts tae the Senior Owresicht Team an' the Heigh Heidyin.
(b) Resource		Meercet owreseers Senior Owresicht Team/ Heigh Heidyin	Adae wi' the meercetin budget betther rates hae bein gat fer buyin' advertisin' space oan wireless, televeesion, an' prent oan accoont o' worl'wide doonward trend i the price o' advertisin'. The mair, the companie hes gat a betther fee fae hits main advertisin' agency efter re-negotiatin'. The Heid o' Meercetin Communications bes speirin intae the rates/ Prices gat oan buyin' advertisin' an' compeerin thaim tae las' yeir's rates an' advertisin' meercet rates generally. Monthtly reports wul bae maide bae ivry main meercet manager tae mak' siccar at sned spennin targets unner differin' heids ir bein' stuck tae. A summin ap o' thae reports wul bae gien ivry thrie monthtstae the Senior Owresicht team an' tae the Heigh Heidyin.

Fu' Savins

Savins – Norlin
Airlan inpit

Savins – Airish
Inpit

The airts at hae bein targeted es a wie o' realisin' cash releasin' efficiencies ir summed ap i the furst column o' the table ablow an' the monitorin arrangements an' missures at wul bae pit intae place tae mak' siccar o' efficiency savinsir gien wi'oot impactin' oan targets an' service gien ir ootlined i the las' column.