

# **Tourism Airlan**

## **Corporate Plen 2008 – 2010**

**16<sup>th</sup> Uptober 2007**

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## Draft Tourism Airlan Corporate Plen 2008 – 2010

*Submission maide fer the Depairtment o' Airts, Spoart an' Tourism an' the Depairtment o' Enterprise, Thrade an' Investment.*

### Executive Summin Ap

Sine Tourism Airlan tuk oan owresicht o' tourism meercetin i 2002, the islan' o' Airlan hes shewn a mair an' mair confident wie o' taakin oan the worl' fer a guid pairt o' the tourism meercet. Proof o' thon bes i the foarm o' thrie simple facts:

- Owreseas visitor earnins tae the islan' o' Airlan **wul hae riz bae 39%** i thon tim'
- Nummers o' owreseas visitors **wul hae riz bae 31%**
- Worl'wide nummers o' arrivals fae owreseas onie riz bae 28% quyhles arrivals i Europe onie grew bae 19% i the saime tim', wi' the ootcum o' the islan' maakin hit's shaire baager internationally.

The challenges facin' the tourism industry maun get carefu' thocht an' apt ection es hit leuks tae keep ap thon level o' performance. Worl'wide the Inthernet bes re-writin' the rulebeuk i terms o' patterns o' researchin' an' beukin', quyhles issues laike the environment, security, catter an' oil price altherations ir mixin' wi' the ris' i lang haul thtravel tae gie a gye differ meercetin environment nor the yin at faced iz onie sax yeirs sine. Competition wul cairry oan risin' es consumers wul hae a mich baager chuse o' destinations, products an' services oan offer nor iver they hed afore. Challenges laike global unrest an' consairns adae wi' healtht ir apt tae cairry oan bein' factors.

The profile o' oor consumers hes gyely althered forebye wi'in thon tim'frame. Wi' mair mobility an' wantin' tae uise tim' mair effectively they ir spoiled fer chuses an' ir assertin' thair richt tae new an' authentic experiences at ir fit tae turn a holiday intae a lif' adventure.

Owre the tim' o' the 2002 – 2004 Corporate Plen, E10.7/£7.2 billion wus maide i owre seas tourism earnins at hed the ootcum o' 22 million tourists fae owre seas. Quyhles owre the lif' tim' o' the Corporate Plen fae 2005 – 2007, hit's expectit at the islan' wul hae maide tourism earnins o' mair nor E12.9/£8.6 billion fae 26 million tourists fae owre seas ootae which 11.8 million wul hae bein promotable visitors. Owre the lif' tim' o' this Corporate Plen 2008 – 2010, hit's expectit at the islan' wul hae maide tourism earnins i a range atween E15.7/£10.5 billion tae E16.1/£10.8 billion fae atween 29.5 tae 30.2 million visitors an' fae atween 13.7 tae 14.1 million promotable visitors. Thon potential riz return wul shew, amang ither factors, the baager spennin oan tourism promotion bae baith jurisdictions owre thon tim'.

Oor targets fer the nex' thrie yeirs ir ambitious. We hae set the bar heigh an' ir projectin' graith i earnins an' visitor nummers tae surpass oor European an' Worl' competition. The net effect wul bae anither ris' i oor shaire o' the worl' meercet shaire, maakin the islan' o' Airlan a mair popular holiday destination nor iver afore.

Tae hit thae targets wur needin' thrie complementary faictors tae keek in. :

- Weel waarkin spennin oan meercetin at wul exploit an' deliver oan hits targets;
- Weel waarkin partnerships wi' the industry sae es tae mak' siccar at the customer cums noo tae the islan' o' Airlan.
- Forderin bae the industry baith Noarth an' Sooth i newer, betther an' mair competitive holiday experiences fer visitors fae aa' owre the worl'.

Alang wi' the faictors abeen Tourism Airlan wul gie mich attention tae fower key priority airts i 2008 at wul impact owre the lif' o' the corporate plen. Thae faictors ir:

- Bringin' in a new mintit islan' o' Airlan brand tae gie worl' cless meercetin' programmes tae oor target meercet. Oor focus bes tae mak' siccar at the brand bes laike nae ither, compellin' an' fit tae bae delivered.
- Biggin a deeper relationship wi' the customer i oor meercetin daeins, hefted bae the bringin in o' a Customer Experience owresicht strategy.
- Maakin baager Tourism Airlan's spennin' oan digital meercetin daeins an' inthernet forderin tae bae neir yin quarther o' oor hale meercetin budget bae 2010. Thon spennin wul mak iz fit tae tak' ap chansts i meercetin tae the customer i new mintit wies an' wul let iz repone tae altherations i media uisage.
- Bringin' in betther wies tae missure oor meercetin effectiveness. We wul bae roullin oot oor key performance mairkers i 2008 at wul shew the daeins maist likely tae gie a heft tae hittin' oor earnin' an' volume targets an wul hae missures o' human resources capability, daeins adae wi' catter, consumer an' thrade objectives an' stakeholder satisfaction.

Wi' thae faictors i place an' the priorities bein' delivered oan, we alloo at we ir fit tae cairry oan performance levels at monie o' oor baag competitors wud hae a crooseness in, strangly mairkin oot the island o' Airlan es yin o' the bes' performin' meercets i the worl' o' tourism.

## **1. Beckgrun**

This paiper hes bein screevit tae ansuer the needs o' the Noarth Sooth Meenesterial Council (NSMC), the Depairtment o' Entherprise Thrade an' Investment (DETI), the Depairtment o' Airs Spoart an' Tourism (DAST) an' the Catter Depairtments o' baith jurisdictions adae wi' Corporate Plennin' an' Tourism Airlan.

Biggin oan the twa Corporate Plens fer 2002 – 2004 an' 2005 – 2007, hit gies a summin' ap o' oor objectives, oor challenges, oor strategy an' the targets an' resources adae wi' thaim at ir needfu' fer the tim' 2008 tae 2010.

## **2. Tourism Airlan's Goals, Vision an' Mission**

I the sax yeirs sine Tourism Airlan hes hed owresicht o' meercetin the island o' Airlan owre seas, we alloo at earnins fae visitors wul hae grew bae E1.3/£0.86 billion an' nummers o' visitors tae the island o' Airlan bae 2.17 million, thon bes a wee thing ahead o' the targets i the 2002 – 2007 corporate plan. The mair, we hae hefted Norlin Airlan i realisin' hits tourism potential bae risin' the nummer o' visitors bae 391,000 i thon tim'. We ir croose tae bae fit tae report at graith fer the island o' Airlan performed betther nor baith Worl'an' European figures i thon tim' frame sae risin' oor meercet shaire tae 1% an' 1.9% respectively.

I Norlin Airlan oor promotional waark hes hefted tae maik maist o' positive faictors laike the peace dividend, inby spennin, betther access an' a mair confident tourism sector, hefted the industry tae shew five weill daein yeirs an oan track fer hits saxth sich yeir. Thairs baag potential fer mair griath i yeirs ahead bit hit cannae bae tuk fer granted an hes need fer oangaein spennin forebye the oangaein commitment o' oor thrade an' industry pairtners.

Biggin oan oor pas' successes, thairs a need the noo fer a new Corporate Plan fer the yeirs 2008 – 2010. Tourism Airlan leuks aa the plan es an enablin' paiper tae get oangaein graith, an' a dynamic an' flexible resource, at wul inevitably alther owre tim' reponnin tae fas' altherin circumstances i oor meercets.

### ***Tourism Airlan's Goals***

Owre the lif' tim' o' this Corporate Plan we wul leuk tae deliver oan the twa goals set oot ablow:

- Risin' tourism tae the island o' Airlan
- Heftin Norlin Airlan tae reach hits tourism potential

## ***2.2. Tourism Airlan's Vision***

Tae grow tourism business tae the island, Tourism Airlan's vision bes tae bae the strategic leaders i owre seas meercetin bae maakin an' deliverin' worl' cless inthergrated meercetin programmes. Tae stimulate intherest an' tae dhrive consumer buyin' we wul uise an' mak' betther oor uise o' meercetin pletfoarms sae the industry can target the customer betther. Through the depth o' oor unnerstannin an' oor engagement wi' oor customers we wul get tae stan'oot i a cluttered meercet. Biggin oan thon consumer unnerstannin we wul communicate tae the industry boadies, Noarth an' Sooth, quhat the consumer demands an' needs fer qualitie o' product an services.

## ***2.3 Tourism Airlan's Mission***

Tourism Airlan wul deliver oan thon vision owre the nex' thrie yeirs bae:

- Unnertaakin destination meercetin programmes tae grow demand tae visit the islan' o' Airlan.
- Facilitatin' an' heftin business linkages tae mak' betther distribution o' the islan o' Airlan tourism product tae likely customers.
- Ectin es an' advocate fer owre seas consumers an' thrade bae communicatin' tae the industry the changes owre tim' tae the islan' o' Airlan brand an' the qualitie o' the tourism experience oan the islan' o' Airlan, alang wi' the needs an' wants o' oor visitors an' o' thaim at nicht visit.
- Unnertaakin airt/product meercetin' an' promotional activities fer Failte Airlan an' the Norlin Airlan Tourist Boord through oor owre seas offaices.

## **3. Organisational Velues**

Tae achieve oor objectives Tourism Airlan alloos at we maun hae a performance dhriv' ethos i place wi' a thradition o' owresicht bae objectives an' advancin' bae deservin' tae. We gie a heigh velue tae thaim at wrocht tae iz, an sae they velue thair waark wi' the companie. Outlined ablow ir the hairtmaist principles o' organisational velues:

- Tourism Airlan bes committed tae reachin' a level o' performance at wul gie furst cless ootcums fer the tourism industry oan the islan' o' Airlan. We bring passion, ambition an' a focus oan results tae oor waark.
- We hae respect fer ithers – thaim we waark wi', oor business pairtners, stakehaulers an thaim at visit oor islan'.
- We ettle aa biggin relationships based oan trust, tae bae honest an' ethical i aa o' oor daeins, an' tae ect wi' integrity aa the tim'.
- We hae a belief i waarkin willin'ly an effectively thegither.
- Tourism Airlan encourages the haein an' pittin intae ection new notions, tae bae fit tae think ootby existin' norms an tae bae fit tae imagine an see notions at irnae current yet an' possibilities at ithers havnae saen yet.
- We velue oor fowk an' thair inpts. We uise modairn bes' prattick, human resources policies at leuk tae waark wi' staff an' thair representative boadies

tae answair thair needs an' tae heft thair forderin. We ettle aa bein' honest an' appen i oor communications, tae lissen tae the notions o' ithers an tae recognise an' celebrate ettlins an' success an' tae heft a healthtfu waark-lif' balance fer ivryboadie at waarks tae iz.

- Tourism Airlan bes fu' committet tae the principle o' fair chansts. We ir committet tae maakin siccar at oor wies o' waarkin an' policies shew bes' prattick i heftin the daein awa' wi' aa foarms o' discrimination i gien waark. Merit an' a fitness –based system foarm the basis o' oor wies o' recruitment an' advancement.
- We ir committet tae waarkin thegither tae gie an' environment at promotes an' hefts the richt o' ivryboadie tae dignity i the waarkplace. I Tourism Airlan we ir committet tae treatin' yin anither richt an gien' respect tae the individuality an' diversity o' thaim we waark wi'.

### *Value fer Catter*

Tourism Airlan strangly taks oan hits responsibility fer gettin' gye guid value fer catter fer tax payers fae quhat the governments, Noarth an Sooth, an ither tourism agencies, hae gien tae iz. Owre the cummin thrie yeirs, Tourism Airlan wul bigg oan hits existin' wie o' waarkin an cairry oan maakin betther oor skeels i the airts set oot ablow:

- **Afore cairryin oot ections plen wi' care.** We wul mak' siccar at tim'tables ir realistic an' alloo fer early plennin an' detailed specification accause thon wul saive tim' an' gear i the lang rin.
- **Mak' stranger project owresicht inby the organisation.** We wul mak' siccar at tim'scales ir' realistic an' at risks ir wrocht oot an owresaen.
- **Cut doon oan complexity an' bureaucracy.** We wul simplify an' streamline complex processes at pit ap costs an the chansts o' hannlins.
- **Mak productivity betther.** We wul focus oan productivity bae betther metchin o' resources tae waarkload needs.
- **Bae mair commercially shairp.** We wul mak' betther dales bae uisin efficient an' effective procurement pratticks.
- **Cut doon the chanst o' fraud.** We wul uise betther wittens an' IT solutions tae cut doon the chanst o' fraud.
- **Cairry oot tim'ly policies an' programmes.** We wul mak' siccar at we hae the maist reliable wittens tae base oor decisions an' daeins oan.

Tourism Airlan bes committet tae keepin' an eye oan, benchmerkin an. Reviewin' oor meercetin programmes oan an oangaein basis. We wul bring in a new system o' misserment at wul tak' in an organisational performance framewaark sae es tae mak' betther value fer catter an' mak' siccar o' a stranger return oan meercetin effectiveness an' competitive stan'oot.

## **4. Tourism Airlan's Organisational Set ap**

Tae mak' siccar o' maximum organisational effectiveness, Tourism Airlan bes dividit intae thrie divisions:

- Brand Forderin an' Meercets Division
- Central Meercetin Division
- Corporate Services an' Policie Division

150 permanent staff, along wi' graduates, student placements, an' general sales agents, waark wi' in thae divisions tae deliver oan oor comprehensive meercetin an' operational programme. Thae thrie divisions ir owresaen bae thrie Directors at ansuer tae the Heigh Heidyin. The Heigh Heidyin ansuers tae the Boord about the progress an delivery o' oor meercetin' an' operational programme ivry montht.

The Boord o' Tourism Airlan bes appointet bae the Noarth Sooth Meenesterial Cooncil (NSMC). The Boord an' Heigh Heidyin ir responsible fer cairryin oot an' deliverin' oan the Corporate Plen tae the NSMC an' reportin' oan Tourism Airlan's key ootcums aa yeir. Ootlined ablow bes oor organisation set ap.

### **Boord**

**Risk Owresicht  
Committee**

**Nominations an'  
Remuneration  
Committee**

### **Heigh Heidyin**

**Brand Forderin  
an' Meercets  
Division**

**Corporate Services  
an Policie Division**

**Central Meercetin  
Division**

Great Britain  
Noarth Amerikey  
New an' Forderin  
Meercets  
Meercetin  
Communications

Boord Secretariat  
Corporate an' Industry  
Communications  
Norlin Airlan an'  
Access Forderin  
Regionality  
Fowk  
Catter

Strategy Forderin  
an' insights  
Consumer repone  
an' Technology  
E-Meercetin

## **5. Review o' Organisational Performance tae Date**

Tae deliver oan hits mandate an' mission, Tourism Airlan identified a when o' key corporate objectives i the 2005 – 2007 Plen. Chief amang thaim wur:

- Tae deliver meercetin programmes o' the heighest international stannart at wul communicate the islan' o' Airlan's brand velues, hairtmaist proposition an' products via the maist apt meercetin channels.
- Tae mak betther e-meercetin capability along wi' Failte Airlan an' the Norlin Airlan Tourist Boord.

- Tae gie owre seas meercetin pletfoarms an' services fer thrade based i Airlan an' owre seas.
- Tae gie owre seas meercetin pletfoarms an' services fer thrade based i Airlan an' owre seas.
- Tae gie strategic airtin tae the industry an' tae gie a comprehensive research programme finnin the islan's bes' prospect meercets an' consumers alang wi' thair evolvin' needs.
- Tae unnertak a fundamental review o' meercetin an' promotion operations i key mainlan' Europe meercets tae re-stairt holidaymaaker graith fae non-grawin meercets.
- Tae leuk aboot mair air route forderin alang wi' airlines an' airport authorities an' tae waark alang wi' sea carriers i the heftin o' car tourin' holidays.
- Tae develop an' implement Norlin Airlan an' Regional campaigns.
- Tae waark alang wi' the Norlin Airlan Tourist Boord i biggin an' maintainin' a positive identity fer Norlin Airlan.
- Tae waark wi' the Norlin Airlan Tourist Boord i realisin' the Strategic Framewaark fer Norlin Airlan an' tae influence the Norlin Airlan product forderin strategy.
- Tae bring in a Business Tourism Stretegy i consultation wi' Failte Airlan an' the Norlin Airlan Tourist Boord.
- Tae bield a culture quhar thaim at wrocht tae iz ir weill velued an' wha, i turn, velue thair joabs wi' the companie.

The 2005 – 2007 Corporate Plen set Tourism Airlan the target o' growin visitor nummers tae the islan' o' Airlan tae 9.1 million i 2007. Norlin Airlan wus targeted tae get 2.1 million visitors, quyhles the target fer the Sooth wus 7.4 million visitors.

Oor forecasts fer 2007 ir at we shud meet the targets fer visitor performance wi' an estimated 9.1 million visitors. The graith i the tim' o' this corporate plen wul bae betther nor baith Worl' an' European arrivals, wi' the ootcum o' the islan' growin hits international meercet shaire. Thon bes doon tae strang performances fae Mainlan' Europe an' Noarth Amerikey ahead o' hit targets fer thae meercet airts. The graith fae thae meercets can bae pit doon tae the baager focus an' spennin oan meercetin, the growin an' improvement o' air access an' the forderin o' new products an' services bae the industry.

I the furst twa yeirs o' the las' Corporate Plen 2005 - 2007, oor traditional meercets(1) i Europe gied 53% o' the graith fae Mainlan' Europe, quyhles the rest o' Europe, maistly maide ap o' the new accession kintras, gied 47% o' the graith. Monie aist European visitors ir maide ap fae boadies wha cum tae Airlan fer purpones o' waark bit tae visit freens an' femmellie. Hooiniver they uise baag components o' tourism products laike accommodation, mait, drink an' attractions. Mair modest graith hes been recorded fer Great Britain an' the new an' forderin meercets.

Hooiniver graith tae Norlin Airlan wul bae a bit less nor expectit accause o' the reported faa i visitors fae Great Britain. Thon's pairtly oan accoont o' a faa i the nummer o' boadies visitin' freens an' femmellie an' a faa i sea capacity includin' the loass o' yin key sea route i 2005. Monie ither faictors ir involved an' Tourism Airlan bes focused oan gettin' a betther unnerstannin o' faictors an' bes leukin aa new wies tae drive graith fae Great Britain i tims tae cum. Visitors tae Norlin Airlan fae



Mainlan' Europe an' Noarth Amerikey wul bae mair nor the target o' 22.4% each an' wul grow bae 76.6% an' 23.3% respectively fae 2005 – 2007. Indicative promotable visitor nummers tae Norlin Airlan hes shewn guid graith tae date i 2007.

We hae achieved oor ither main hairtmaist objectives, forderin award-winnin' meercetin campaigns an' materials, at hae successfully targeted oor bes' prospects – “Sichtseers an' Heirskeip Seekers”.

We hae maide betther oor e-meercetin capabilities an' gien oor promotional message tae a baager audience oan oor nex'-generation wabsteids-roulled oot i 28 meercets oan 35 steids an' i 14 leids. The steids wur designed tae mak' siccar at potential an' repeat customers get worl' cless wittens services an' can asily bae airted tae oanline an' ither buyin' services fer the fu' range o' available products, packages, flichts an' ferries. Owre the tim' o' the Corporate Plen 2005 – 2007 mair nor 14 million customers visited [www.discoverireland.com](http://www.discoverireland.com) o' which mair nor 5 million wur sent oan tae industry wabsteids.

We hae farder maide baager the meercetin pletfoarms fer the tourism industry, maakin an extensive suite o' mair nor 200 owre seas meercetin chansts at presents products an' service giers wi' chansts tae directly get tae owre seas customers. Thae pletfoarms mak' the industry fit tae heft thair products an' services i the maist cost-effective wie tae oor bes' prospects.

We hae carriet oan gien the industry steerins oan the bes' prospect meercets an' pairts tae target, at bes based oan the insichts gaithered fae oor research programme.

We hae carriet oot a review o' the European, British an' Noarth American Meercets tae deliver oangaein graith fer the islan' o' Airlan. The noo we ir finishin' oor review o' New an' Forderin Meercets.

- (1) Traditional European Meercets include France, Germany, Italy, Netherlands, Spain, Nordics, Belgium/Luxembourg, Portugal, Austria an' Switzerland.

We hae waarked wi' airlines an' airport authorities tae heft mair direct, handy an' competitive services. Sine 2005, simmer air access hes ris' bae 22% quyhles wunther air access hes ris' bae 29%. We hae fordered Car Tourin' campaigns i Great Britain alang wi' sea carriers i ordair tae grow sea access at i 2007 hes saen a return tae graith.

We cairry oan waarkin wi' baith Bord Failte Airlan an' the Norlin Airlan Tourist Boord tae forder innovative pletfoarms at wul reach oor bes' prospects. We roulled oot the “Super Airt” campaigns at hae added anither extra dimension tae oor owre seas meercetin campaigns an' hae gien positive ootcums fer the airts i the Sooth.

We hae delivered meercetin campaigns i oor hairtmaist meercets at wur airted aa Norlin Airlan. We hae wrocht wi' the Norlin Airlan Tourist Boord i the roullin oot o' the Strategic Framewaark fer Norlin Airlan, influenced the Norlin Airlan product forderin strategy an' jointly staired oor meercetin programmes tae the Norlin Airlan industry.

We hae wrocht wi' Failte Airlan, the Norlin Airlan Tourist Boord an' industry pairtners i roullin oot the Business Tourism Strategies. We hae gien the human resources needfu' tae target thon pairt effectively an' deliver oan the strategy.

A waarkin inby communications programme bes in place the noo. The baagest pairt o' oor staff rated the company positively i oor waarker satisfaction surveys an' we hae bein rated es yin o' the tap 50 companies tae waark fer oan the islan' o' Airlan i 2006 an' 2007, forebye bein yin o' the tap 100 bes' companies i Europe i 2006.

The Corporate Plen 2005 – 2007 identified forebye earnin targets fer 2007 tae the islan' o' E4.55/£3.1 billion, wi' targets fer the Republic o' Airlan o' E4.0 billion an' Norlin Airlan o' £374 million.

The latest meercet intelligence shews at we ir oan treck tae reach the all islan' targeted graith levels es shewn i the table ablow. Quyhles the positive visitor nummers dinnae tak' intae accoot the indicators o' challengin' thradin, puir profits an' disparities atween airts bein felt bae sim sectors, hooiniver they clearly shew the inpit o' Tourism Airlan i achievin' the objectives 'greed fer hit bae the NSMC.

#### **Corporate Visitor Targets 2005 – 2007, Ectual Ootturn 2005 – 2006 an' Forecast 2007**

*Visitor Targets (000's)*

*Visitor Ootturn (000's)*

*Catter Targets Em's*

*Catter Ootturn Em's*

*Catter Targets £m's*

*Catter Ootturn £m's*

## **6. A Challengin' an' Dynamic Environment**

The trevel an' tourism environment hes gat gyely althered sine Tourism Airlan's furst Corporate Plen wus maide. The demands o' the meercetplace cairry oan forderin aa a faster gettin' rate. Ootlined ablow ir sim o' the challenges facin Tourism Airlan owe the lif'tim' o' the Corporate Plen.

### ***The Worl'wide Trevel an' Tourism Pictur'***

Tourism Airlan an' the industry ir facin' a wheen o' haird worl'wide challenges, at maun bae leuked intae an ected oan gif we ir tae bae fit tae compete fae oor shaire o' owre seas tourism.

- The Euro aa' Sterlin' cairry oan getting stranger agin the Dollar an' thon wul gie a waefu sned tae the buyin' puer o' US visitors tae Europe an' Irlan. Shairp faas an lifts o' the price o' oil an' the surchairges adae wi' thaim at ir

passed oan tae customers fae tim' tae tim' micht hae anither waefu' impact oan worl'wide trevel, mair sae oan lang haul meercets.

- Fowk ir gettin' mair an' mair wrocht ap aboot the environment., climate altherin an, gyely sae, aboot the pittin oot o' Carbon. I tims tae cum visitors wul bae mair apt tae chuse tae visit a place at baes freenlie tae the environment an affairs sustainable tourism products, tae sned the pittin oot o' carbon governments micht pit an eco tax oan flichts.
- Demand cairries oan bein' influenced bae price, reinforcin' laiter bookin' trends i aa o' the islan's main meercets an' maakin' competition keener atween destinations an' trevel companies.
- The importance o' security wul stey tae the fore, the mair sae i the licht o' terrorist attacks lately an' the potential fer mair sich incidents i tims tae cum. Customers wul bae consairned aboot trevelin' tae destinations quhar they alloo they wulnae bae saife.

### ***Consumer Preferences***

The behaviour o' consumers bes altherin quaak an' Tourism Airlan an' the industry maun reponae tae thon gif we ir tae attract visitors i tims tae cum. Among thae altherations ir:

- Consumers ir mair carefu' aboot hoo they plen thair bye tim' an ir' wantin' tae get the maist ootae hit. Quyhles oan holiday they ir wantin tae experience es mich es possible. Destinations at offair the consumer the chanst tae experience a when o' differ products an' services i the easiest wie wul get maist benefit.
- Consumers ir mair leukin fer true bill an' new experiences laiike unco environments an' heirskeips, personal an' physical betterment an' emotional forderin. They ir leukin fer mair personalisation fae products an' services an' ir mair an' mair axin suppliers tae gie thon level o' personalisation.
- Europeans ir aulder gettin' ; the 55+ age group bes gettin' tae bae a mair an mair important pairt o' the holiday consumers, an destinations need tae target thaim wi' airted messages an' new products.

### ***Effective Meercetin***

Meercetin principles an' channels o' communication ir altherin quaak an' Tourism Airlan maun bae fit tae alther an' forder gif hit bes goin fer tae compete i thon new environment. Among thae challenges ir:

- Mair convergence, braakin ap an' saturation i ,media wi' the ootcum o' traditional meercetin wies o' gettin' the attention o' mass audiences bes gettin' less effective. The consumer bes exposed tae mair stations nor iver afore laiike satellite TV, digital technologies an' prent. Destinations wul hae tae bae mair creative an new mintit i thair meercetin campaigns an' uise o' the media.
- Traditional distribution channels ir altherin an' forderin. Mair an mair consumers ir uisin' the Inthetnet an search engines tae leuk aboot holiday products an' services I' mair detail nor iver afore. Monie trevel agents/tour operators ir cuttin' doon thair operations ir gaein in wi' oanline operators tae

bae fit tae compete oan the wab.. Destinations laike Airlan maun bae fit tae alther an' forder thair wies o' meercetin tae mak' siccar at distribution o' tourism products is effectevly targettin' the consumer.

- Consumers hae mair puer tae control the media they uise an sae leemet the meercetin messages they ir exposed tae. Mair an mair they ir generatin' thair ain content oan new media pletfoarms laike YouTube an' MySpace. Thon wul mak' hit haird fer a destination tae successfully control an' deliver the message hit wants tae sen' tae thaim at nicht visit.

### ***Appeal o' the Islan o' Airlan***

The islan' o' Airlan bes subject tae oangaein altheration an' Tourism Airlan an' the industry maun tak' tent o' thae altherations an' adapt oor meercetin' daeins accordin'ly. Amang thae altherations ir:

- Recent meercet intelligence shews hoo the wairmth o' oor traditional welcum, quyhles hits strang yet, bes gettin' less.
- We ir noo a gyely multi-heirskeip society wi' fowk fae aa owre the worl' waarkin i the tourism industry. The mair at thon brings diversity, mair leid skeels an' mair awareness o' differ heirskeips owre seas visitors ir noo no es apt tae meet an' dale wi' Airish fowk.
- The strenght o' the islan's environment, lan'scape an' scenery hes bein saen tae bae declinin'.
- The Sooth hes unnergane an' oangaein faa I bein saen es velue fer catter.
- The oangaein graith i shoart breks an' the demand fer holidays i toons wul mak' hit hairder tae get an airted distribution o' visitors.
- Fer Norlin Airlan tae get oangaen graith fae owre seas meercets thair hes tae bae oangaein spennin' an' forderin i a clatter o' differ tourism products.

### ***Organisational Forderin***

Es the analysis abeen shews the macro-environment quhar Tourism Airlan bes operatin' pits ap a when o' strategic challenges fer meercetin the islan' o' Airlan owre seas. Amang thae challenges ir:

- Mair competition fae new destinations an' escalatin' spennin oan meercetin fae existin' competitors.
- Due tae leemeted human resources, hit wul bae challengin fer Tourism Airlan tae fully exploit new source meercets, geographies an' segments wi'in fordered an' forderin kintras.
- Gien es hoo consumers ir maakin mair uise o' the Inthernet fer researchin' an' bookin' trevel hit wul bae vital fer Tourism Airlan tae cairry oan forderin hits e-skeels tae repone tae new meercet realities.

These ir the main challenges fer the islan's tourism industry an' fer Tourism Airlan. Thair wul bae a need fer baag strategic repones hefted bae baager an' mair airted spennin. Hooiniver thair ir a when o' positive forces at wul heft iz repone tae the challenges facin' iz:

- Mair prosperity i the Westhern Worl' an mair access tae new destinations hae hed the ootcum o' a baager appetite fer worl' trevel.
- Consumers irnae es sensitive tae international hannlins laike terrorism, healtht scares, political unrest, an destinations get owre hannlins quaaker nor i pas' tims.
- The ris i access, maistly fae laigh cost carriers hes maide hit aiser fer consumers tae trevel tae mair destinations fer less catter nor iver afore. The islan' o' Airlan' hes gat a disproportionate benefit fae thae rises lately.
- The gettin' betther o' infrastructure an' accommodation oan the islan' an' the ris i differ activities fer the consumer tae tak' pairt in, laike daeins adae wi' heirskeip an' arts festivals hae gien a baag heft tae the holiday experience fer the customer.
- Research amang visitors heidin ootae the kintra shews hoo the feck o' holidaymakers hae a gye guid holiday an' at the islan' o' Airlan met ir wus betther nor thair holiday experiences.

## 7. Meercetin an Organisation Programme

Es competition rises, the nex' thrie yeirs wul bae gye challengin' fer the tourism industry. Wi' new destinations bein' offered tae the consumer, the industry wul need tae deliver new an' innovative products an' mak' siccar at the islan' o' Airlan bes keenly priced. Tourism Airlan maun cairry oan gien worl' cless meercetin programmes maakin uise o' baith oan an' affline mediums tae heft the islan' es a maun see destination, tae mak' siccar at the islan' o' Airlan hes competitive stan'oot i oor key target meercets an' gie apt pletfoarms tae the thrade.

Efter reviews o' aa o' oor hairtmaist meercet airts an' analysis o' the latest meercet intelligence, the islan' o' Airlan's baigest meercets owre the tim' o' this Corporate Plen wul stey Great Britain, Mainlan' Europe an' Noarth Amerikey wi' New an' Forderin Meercets gien guid chansts i the langer term. Tae grow volume graith an' meercet shaire the islan' wul need tae:

- Effectively target the maist apt customers.
- Pit the richt message acroass.
- Offer the richt products tae potential customers.
- Mair innovation i hits uise o' meercetin channels fer tae deliver effective sned through fer oor message.

Tourism Airlan hes fordered a "strategy ee"tae prioritise oor daeins owre the 2008 - 2010 Corporate Plen tim'. Hairtmaist tae iz bes the delivery o' the **targets** pit forrit fer revenue, visitor an' promotable graith. We wul get thon bae oor **focus** oan mair meercet shaire, securin' Norlin Airlan an airts graith, betther return oan meercetin effectiveness an' competitive stan'oot an;' bae effectively managin' the brand. We hae wrocht oot a seiven tined **strategy** tae realise oor focus an deliver oor targets.

### Strategy

### FITNESS

ADVOCACY

CONSUMER

**THRADE**

**NORLIN AIRLAN**

**ACCESS**

**AIRTS**

[Pink circle] **Focus**

**Betther return oan  
Meercetin investment an'  
Competitive  
Stannout**

**Meercet shaire graith**

**Meercetin the brand**

**NI an' RoI  
Airted graith**

[blue disc] **Target**

Revenue,  
Visitors an'  
Promotable

Wittens o' hoo Tourism Airlan wul deliver oan the 'strategic ee' ir outlined i the sections ablow. Section 8 ootlines oor targets fer catter, visitors an' promotables. Oor focus fer the nex' thrie yeirs bes detailed i Section 9. Finally the strategies at wul deliver oan thae targets ir split intae seiven specific sections at ir outlined i Section 10.

## **8. Targets**

Shud oor forecasted graith fer 2007 bae achieved, then the targets set fer Tourism Airlan i hits 2005-2007 Corporate Plen wul hae bein neir fu' met. Thon wul bae an unco achievement fer the organisation gien the slae graith i Worl' an' European tourism an' the gye haird meercetin environment o' the las' when o' yeirs.

I wrochtin oot the targets fer the tourism industry, differ faictors hae tae bae tuk intae consideration laike ootbound meercet graith forecasts, access forderins an' target meercet potential, forebye the challenges ootlined abeen. Mair nor thon the Worl' trevel meercet wul likely bae disrupted owre the lif'tim' o' the plen bae yin ir mair natural hannlins, serious terrorist daeins ir, indeed, a pandemic o' seekness. No withstannin thon the unnerlyin trend steys apward fer tourism trevel graith fer es far ahead es can bae saen.

I settin' targets fer 2008 – 2010, Tourism Airlan reviewed a when o' possible graith scenarios fer tae wrocht oot the maist ambitious bit fittin' target fer owre seas tourism fer the nex' thrie yeirs. Based oan oor neirness wi' in Europe an' adae wi' the fect at we offer potential visitors heirskep an' scenic holiday experiences at ir similar tae oor competitors i Europe. Tourism Airlan alloos at the ootbound forecast fae aa meercet airts tae Europe bes a ouch mairk oan which tae set oor targets fer tims tae cum. Hooiniver, haein reviewed the European target, we feel at we wul bae fit tae streech the targets an' bae mair ambitious nor oor competitors. European tourism bes forecast tae grow bae 4.8% i revenue terms owre the lif'tim' o' the Corporate Plen, hooiniver,

Tourism Airlan alloos at inbound tourism tae the islan' o' Airlan can grow ahead o' the Europe average an' deliver an average graith fae atween 6.6% tae 7.5% i revenue yeirly owre the nex' thrie yeirs. The chart ablow outlines the twa scenarios fer revenue graith.

### **Revenue Target Scenarios: Tae Europe an' Islan' o' Airlan**

#### **Lower Target**

#### **Streech Target**

I the saime wie we ir settin heigher targets fer yeirly visitor graith fae atween 4.2% tae 5.1% aa a tim' quhan worl'wide tourism arrivals ir onie expectit tae grow bae 4.1% an' European arrivals ir forecast tae grow mair slaely agin aa 3%.

Tourism Airlan alloos at thae targets at ir aa the apper enn o' the expectations can bae gat, yinst the assumptions unnerlyin thaim ir delivered oan. Amang thae assumptions ir risin' meercetin spennin, oangaein betterments i access, infrastructure an product forderin, an cairryin through the initiatives identified i the National Forderin Plen, the 'New Horizons for Irish Tourism' i the Sooth an' the 'Strategic Framework for Action in Northern Ireland'.

I thon regaird shud yin ir mair faictors alther i a baag wie, laike the needfu' catter no bein' tae han', the targets an' plen fer cairryin thaim oot wul bae althered es bes fittin'.

### ***8.1 Promotable Targets***

Tourism Airlan's baagest meercetin focus bes oan 'promotable visitors' i.e. thaim whase potential reason fer visitin' includes holidayin', learnin' Inglis, gaein tae a conference/corporate maetin ir taakin an incentive trip, an' wha can bae influenced tae consider the islan' o' Airlan i thon regaird.

Promotable visitors ir important i keepin' ap the tourism industry's infrastructure an we alloo at thair bes strang potential fae thon sector. The mair at monie sectors o' the tourism industry rely forebye oan business fae non-promotable sectors, ie thaim heir fer direct business purpones ir thaim at ir visitin' freens an' femmelie, the industry hes need o' aa sectors tae perform weill fer tae meet catter targets an' mak' a profit.

Promotable visitor targets ir gyely ambitious an' ir set tae grow ahead o' oor visitor targets. Thon bes agin the lang term worl'wide trend at hes saen total nummers o' visitors ris' ahead o' promotable nummers. We ir targettin' strang promotable graith fae aa o' oor main meercet airts. Noarth Amerikey an' New an' Forderin' Meercets wul gie the strangest graith quyhles we ir expectin' oangaein positive graith fae Mainlan' Europe es conditions stey guid. Ootlined ablow ir the promotable targets owre the thrie cummin yeirs bae meercet airt.

#### **Aggregate Promotable Visitors tae the Islan' o' Airlan an' Targets 2008-2010**

**2004 2005 etc**  
**Ectual Ectual etc.....**

**Republic o' Airlan**

## Norlin Airlan

### Aa Islan' Total

#### Promotable Visitors bae Meercet tae Republic o' Airlan an' Norlin Airlan 2007 Forecast an' Targets 2008 – 2010

Republic o' Airlan			Norlin Airlan		
2007 Forecast	2007 – 2010 Altheration	2010 Target	2007 Forecast	2007 – 2010 Altheration	2010 Target

#### Great Britain

#### Mainlan' Europe

#### Noarth Amerikey

#### New an' Forderin Meercets

#### Fu' Amoont

Note thae targets hae bein fordered uisin the bes' wittens tae han' the noo adae wi' 2007 performance. They ir preliminary an' wul bae reviewed yinst fu' yeir performance data cums tae han'.

Hooiniver, oan accoont o altherations i consumer wies o' gaein, motivations fer travel an een the grawin diversity amang the population, we alloo at a review o' the definition o' 'Promotable Visitors' bes needfu'. Lately thair hes bein an' altheration tae the mak' ap o' the tourism business worl' wide. The WTO alloos at visits tae freens an' femmelie hae ris, quyhles holiday visits ir performin' ablow total visits. Latest meercet intelligence hes shewn at thaim cummin tae the islan' o' Airlan oan business ir tae visit freens an femmelie ir mair an' mair taakin a holiday quyhles i Airlan. I the licht o' thae altherations Tourism Airlan wul review the the mixtie o' business tae the islan', particularly fae the Visitin Freens an' Femmelie segment, an' wul luk tae forder a model tae wrocht oot the economic velue o' ivry cless o' visitor. Thae wittens wul bae uised tae wrocht oot oor bes' destination strategy.

## 8.2 Catter an' Visitor Targets

Visitors tae the islan' o' Airlan ir maide ap o' fowk wha cum oan business, tae visit femmelie an' freens ir fer promotable reasons laike holidays, gaein tae a conference ir taakin pairt i incentive trip trevel ir tae lairn Inglis. Sine thair's an obvious important symbiotic sibness atween total visitors an thaim at cum fer promotable reasons, gettin' yin set o' targets wul heft i realisin' the ither.

Catter bes generated fae visitor spennin oan the islan' o' Airlan. Sae graith I revenue bes sib tae a ris' i baith total an' promotable visitors.

### 8.2.1 Catter Targets

Owre the lif'tim' o' the Corporate Plen 2008 – 2010, tourism hes the potential tae generate atween E15.7/£10.5 billion an' E16/£10.8 billion fer the islan' o' Airlan i



earnings from overseas (through duties on fares for carriers) and will give the economic benefits below:

- a) Rise the level of consumer spending in the island's economies
- b) Add to the level of home employment
- c) Contribute to balance of payments stabilisation
- d) Generate more tax revenues

The delivery of the revenue growth will depend on managing the quicker promotable growth, outlined above. The more we depend on the growth from other parts of the visitor mix like Visiting Friends and Family, business and others.

The current targets can be higher than the predicted average revenue growth for both Europe and the World (4.8% and 6.6% respectively) in this time.

The targeted growth of current and visitors is shown in the tables below:

**Aggregate Current from Visitors to the Island of Airlan  
2004 – 2007 and Targets 2008 – 2010 (Current Terms)**

[Note: Translation below serves for both following tables with the single change to Table 2 being “Sterling” translates to “Sterlin”]

2004 Actual	2005 Actual	2006 Actual	2007 Forecast	2007-2010 Alteration	2010 Target
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Euros

**Republic of Airlan**

**Norlin Airlan**

**All Island Total**

Note: £1 = £0.67. These targets have been worked out using the best estimates to date of the 2007 performance. They are not new and will be revised in future years performance estimates in the future.

**Current from Visitors from Meercet Airt to the Republic of Airlan and Norlin Airlan  
2007 and Targets 2008 – 2010 (Current Terms)**

[Note: Translation below serves for both following tables with the single change to Table 2 being “Sterling” Translates to “Sterlin”]

Republic of Airlan			Norlin Airlan		
2007 Forecast	2007 – 2010 Alteration	2010 Target	2007 Forecast	2007 – 2010 Alteration	2010 Target

Euros

## *Great Britain*

## *Mainlan' Europe*

## *Noarth Amerikey*

## *New an' Forderin Meercets*

## *Fu' Amoont*

Note: Thae targets hae bein wrocht oot uisin the bes' wittens tae han' the noo adae wi' 2007 performance. They ir oot newins an wul bae revised yinst fu' yeir performance wittens ir tae han'.

The catter forecasts ir i current terms. Inflation hes bein biggit intae oor projections an' bes based oan the Consensus Economics forecast o' inflation aa 2.1% at bes gat fae inflation figures fae oor owreaseas meercets. The mair at Airish inflation bes forecast tae bae heigher i thon tim', hit bes the inflation i oor owreaseas meercets at wul hae the baagest impact oan revenue an' this reflects oor visitors buyin' pouer.

Thae catter targets ir gyely ambitious aa a tim' quhan the consumer bes leukin fer mair velue at the industry offers, either bae real price sneddins ir bae offerin' mair services. The mair, the faa i lenght o' stey bes pittin mair pressure oan the velue o' ivry visitor.

## **8.2.2 Visitor Targets**

We hae set ambitious visitor targets at wul see nummers o' visitors grawin fae atween 13.2% tae 15.9% owre the nex' thrie yeirs. Thon target bes based oan gettin' graith i line wi' the outbound meercet fae Great Britain, quyhles gettin' mair graith fae Europe, oan accoont o' oangaein graith i access an meercetin spend. Fae Noarth Amerikey we ir leukin forrit tae abeen-average outbound graith oan accoont o' the altherations i the US-Airlan bilateral, bit thon depends oan gettin' an oangaein additional meercetin forderin fund fer Noarth Amerikey an' a bagger etlin tae heft Shannon an' Airlan's west coast. Fae New an' Forderin Meercets we ir lookin' forrit tae strang graith, (abeen average ootbound graith), es new meercets appen ap, hefted bae an oangaein forderin fund tae exploit the potential fae thon meercet.

### **Aggregate Visitors tae the Islan' o' Airlan 2004 – 2007 an' Targets 2008 – 2010**

<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2007 – 2010</b>	<b>2010</b>
<b>Ectual</b>	<b>Ectual</b>	<b>Ectual</b>	<b>Forecast</b>	<b>Altheration</b>	<b>Target</b>

*Euros*

*Republic o' Airlan*

*Norlin Airlan*

*Aa Islan' Total*

**Visitors bae Meercet tae Republic o' Airlan an' Norlin Airlan  
2007 Forecast an' Targets 2008 – 2010**

Republic o' Airlan			Norlin Airlan		
2007 Forecast	2007-2010 Altheration	2010 Target	2007 Forecast	2007-2010 Altheration	2010 Target
<b>Great Britain</b>					
<b>Mainlan' Europe</b>					
<b>Noarth Amerikey</b>					
<b>New an' Forderin Maarcets</b>					
<b>Fu' Amoont</b>					

Note: thae targets hae bein wrocht oot uisin the bes' wittens tae han' the noo adae wi' 2007 performance. They ir oot newins an wul bae revised yinst fu' yeir performance wittens ir tae han'.

### **8.3 Norlin Airlan Graith**

Owre the lif' o' this Corporate Plen Norlin Airlan bes targeted tae mak' £1.24 billion ap tae £1.28 billion i owreseas tourism earnins at wul bae a 20.5% tae 20.2% ris' oan the forecast ootturn fer 2007 (the saime es a compound average graith rate o' 7.5%). Owre this tim' thair bes the potential tae deliver anither 231,000 tae 282,000 mair visitors tae Norlin Airlan an' we ir forecastin' at promotable visitors wul grow quaaker tae Norlin Airlan nor tae the Republic o' Airlan. Tae mak' siccar o' thon graith i promotable visitors Norlin Airlan wul hae tae grow quaaker nor the Islan' o' Airlan i Great Britain an' i Mainlan' Europe an' es quaak i Noarth Amerikey. Gien the laigh level o' holiday graith fae Great Britain we ir expectin' furst cless graith fae thon meercet owre the cummin thrie yeirs.

Hooiniver Norlin Airlan bes facin'intae a challengin' tim' i terms o' tourism forderin. Theday's level o' investment i tourism an' daeins adae wi' hit, baith public an' private, leuks tae bae less i Norlin Airlan oan a pro rata basis nor baith the Republic o' Airlan an' Great Britain. Quyhlye, the noo, the tourism industry i Norlin Airlan bes gettin' a guid level o' success, thon bes fae a laigh base. The guid conditions at unnerpinned thon graith ir, the noo, maistly faictored in, sae tae hae step graith fer the tourism industry a baag investment programme maun bae pit intae place. Thon programme shud bae driv' bae the private sector an' hefted bae the public sector wi' fittin' interventions an' investment i public sector projects.

Tourism Airlan strangly echoes the notions o' the Norlin Airlan Affairs committee, wha' i thair report oan 'Tourism in Northern Ireland and its Economic Impact and Benefits' heighlights the fect at "*The tourist industry i Norlin Airlan maun bae fordered i sichin a wie at the beautie o' key attractions bes kept an' fowk hae bieldsum places tae stey quyhles visitin' thaim. The kintra hes need o' an infrastructure at maks trevel, especially bae public transport, asier nor hit baes the*

*noo, gif government sees the gye baag economic impact o' tourism, an gif private enterprise, waarkin alang wi' statutory boadies can forder thon recognition intae a mensible plen thair isnae onie reason fer wie the success o' tourism i the Republic o' Airlan cannae bae hed i Norlin Airlan tae the guid o' the hale island o' Airlan an' wi' Norlin Airlan haein the saime status es Scotlan' an' Wales es a UK tourist destination."*

Forebye thon hit'll bae needfu' tae spen' catter tae mak' the Signature Projects a reality. Thair wul bae need fer oangaein spennin oan infrastructure, products, (particularly heigh cless hotels), an the forderin o' human resources fer tae realise i fu' the potential o' the Norlin Airlan tourism industry.

Investment i aa o' thae sectors wul mak' an environment fer deeper enjoyment o' oor diverse an' rich heirskeip an' fowkgates, maakin a pletfoarm fer mair involvement i heirskeip an' spoartin daeins, an forebye maakin a richer tourism experience. Thon spennin wul hae a guid impact oan the tourism product, lettin' thair bae mair graith i the industry i tims tae cum.

The maist important consideration fer the tourism industry i the shoart tim' bes hoo tae tak' premium graith fae the undooted potential at bes thaire. The unco natural assets enjoyed bae Norlin Airlan alang wi' hits differ an' rich Airish, British an' Ulster Scotch heirskeip, gie a guid notion at thon potential bes achievable. Hooiniver hit maun bae gien at worl' wide tourism bes een mair competitive. Success i tims tae cum wul bae driv' bae a comprehensive unnerstannin o' consumer needs an' the needfu' spennin tae deliver oan thae needs.

The mair at investment an' forderin bes needfu' tae fully exploit the tourism potential i Norlin Airlan, Tourism Airlan alloos at visitor nummers an' earnins fae tourism wul bae fit tae grow abeen baith European an' Worl' rates o' graith. Graith can undootedly bae gat owre the lif' o' the Corporate Plen, the mair i licht o' the strang graith i direct air access services lately.

#### **8.4 Republic o' Airlan Graith**

I Sictimmer 2003, the Government i the Sooth brocht oot *New Horizons for Irish Tourism: An Agenda for Action*. Thon set oot mair nor 70 key ection points adae wi' meercetin, access, product forderin, infrastructure needs an' industry trainin', at aa maun bae brocht in tae deliver the ambitious targets fer the tourism industry i the Sooth.

Thair wur positive ootcums amang thaim mair air access tae Airlan, the appenin ap o' new owreseas meercets an' innovative industry forderin plens wi' the ootcum o' the Sooth bein pit oan a strang fittin fer graith i tims tae cum.

Forebye thon abeen, the private sector hes maide baag investment (E3b/£2billion i the pas' 5 years) i the Republic o' Airlan, maistly oan accommodation facilities laike hotels. The National Forderin Plen fer the tim' 2007 tae 2013 brocht oot bae the Government i the Sooth sees the public sector spennin E800m/£536 million i direct tourism investment owre thon tim', hefted bae sib spennin oan airts, heirskeip an spoart facilities o' sim E2.1b/£1.4 billion.

Owre the cummin thrie yeirs the Republic o' Airlan wul hae positive revenue graith o' about E13.8 billion tae E14.2 billion. Tourism Airlan alloos at total visitors wul grow bae 13.3% tae 15.9% an' promotable visitors tae the Republic o' Airlan wul grow bae 13.7% tae 16.6%.

## 9. Focus

Tae get tae oor proponed targets, Tourism Airlan maun focus oan the strategic priorities ablow at wul bae gien bae the seiven-tined strategy.

- **Meercet Shaire Graith** aheid o' Worl' an' European levels an' individual meercet targets leukin tae ris' the islan o' Airlan's shaire o' European visits.
- **Norlin Airlan an' Graith i the Airts** fae risin' revenue, visitors an' promotable visitors throughout the islan'.
- **Managin' the Brand** bae maakin siccar at the promise maide tae potential customers metches thair experience o' the islan'.
- **Return oan Meercetin Effectiveness an' competitive Stan'oot** bae a process o' oangaein bettherment an' gettin' mair sned-through

## 10. Strategy

The seiven – tined strategy an' ection plens at wul gie graith ir ootlined ablow:

### *Consumer Strategy*

Tourism Airlan's consumer strategy wul bae airted aa stirrin' ap demand fae target segments an' enticin' visitors through the depth o' oor unnerstannin an engagement, heighlichtin at noo bes the tim' tae visit the islan' o Airlan fae fordered meercets. I emergin' meercets we wul airt oorsels oan maakin a knawin about the islan' o' Airlan amang potential customers.

#### **10.1.1 Consumer Focus**

Tourism Airlan hes wrocht oot hits consumer focus fae a product-led segmentation wie o' cummin aa a mair proective “need based” segmentation approach. Thon approach saen the Sichtseers an' Heirskeip Seekers es the main segment at wul gie oangaein catter an' visitor graith fer the industry.

Owre the cummin thrie yeirs we wul cairry oan focusin' oan thon segment , at i 2006 accounted fer about 2.5million holiday visits generatin' mair nor E1.6b/£1.1 billion fer the islan's economy.

#### **10.1.2 Oor Brand**

Throughout 2007, Tourism Airlan has been carrying out a review of the tourism Brand Airlan to get a further and deeper understanding of our Brand. This work will make it fit to meet the different appeals of the brand in our core markets. The Review has looked at every aspect of the tourism brand and has carried out much consultation with the industry and stakeholders. The review has tested the essence and personality of the brand to see what is needed for change. It has also looked at the brand to see (a) what is the experience and (b) what is the relevance to our primary target groups. The review has also looked at the changes to our heritage as we get to be more diverse and multicultural. Finally, we have reflected on how economic changes in the island of Airlan have impacted on our brand proposition and in particular in terms of natural and scenic beauty. The findings from the review will be brought in to our evolving consumer strategy in 2008 and will lead to a new marketing campaign that will help us to communicate the new brand essence and message to our target markets. Our new marketing campaign will be brought in in 2009. We will communicate our findings to inform the development of services and products that will give tourism a better consumer experience.

### **10.1.3 Communicatin' wi' the Consumer**

Using the position recommended by the brand review in 2007, Tourism Airlan will make, further and continually refine its world-class marketing materials to make it clear at the Tourism Brand Airlan stands at the heart of tourism marketing and at our marketing offices it will be equipped to have maximum impact and stand-out.

The marketing communication mix will be used to deepen our engagement with our customers, and we will be bringing in a Customer Experience Oversight programme. At every level of the mix we will focus on personalising the experience.

We will carry on integrating our marketing channels and use different marketing media to target our best prospects in our primary markets. We will make use of all key marketing channels and focus on the island of Airlan with key media across our international markets.

Tourism Airlan will focus on the growing importance of the e-world and digital technologies to engage, attract and facilitate consumers. Tourism Airlan will look to grow its spend on digital marketing and in 2007 it was 14% of the total marketing budget for 2010, a rise of over 80%. This target will be met as a result of the new marketing communications strategy and after the implementation of the brand review.

We will carry on developing Tourism Airlan's web presence to become a cutting-edge first-choice site for our consumer segments in identified markets at every stage of the consumer decision-making process. We will create a world-class portal to make it easier to interact between our trade and consumers to promote our island's tourism products in the world-wide online marketplace.

Tourism Airlan wul ris' hits uise o' meercetin effectiveness missures tae gie mair competitive stannout i lang stannin an' emergin' oan an affline meercetin mediums i gettin' tae oor bes' prospects.

#### **10.1.4 Meercet Focus**

I keepin' wi' the las' Corporate Plen, Tourism Airlan bes mindet tae cairry oot meercet specific reviews fae tim' tae tim' owre the cummin thrie yeirs. Tae mak' siccar at oor meercet strategies an' ections stey focused we wul unnertak strategic reviews i mainlan' Europe i 2008 an' i Great Britain i 2009 tae identify the baigest chansts fer graith.

Great Britain, oor baigest meercet, wul stey oor primary focus owre the cummin thrie yeirs. We wul cairry oan bringin' in meercetin campaigns at wul turn the heigh level o' intherest i visitin' the islan' o' Airlan intae the buyin' o' an ectual holiday. We wul cairry oan wi' oor Car Tourin'/Langer Holiday campaign i Great Britain tae encourage a langer lengtht o' stey. Waarkin wi' the industry, we wul mak' siccar at oor advertisin', meercetin an heftins stey creative an' inspirin' i the een o' the consumer.

Tae get oangaein graith i Europe we wul big oan the air an' sea access we hae noo an cairry oan uisin futtur meercetin chansts arisin' fae mair direct, handy an' keen services. We wul wrocht tae mak' siccar at oor messages ir appealin' tae the differ consumers i oor lang stannin an forderin meercets acroass Europe. Tourism Airlan wul cairry oan forderin an' uisin' partnerschip pletfoarms at wul let the industry tae stir ap intherest an dhrive buyin.

The review o' the Noarth American meercet shewed hoo hit gies guid chansts fer mair tourism graith. Thon graith wul bae ettled bae mair capacity an' bae the forderin o' new access routes i 2008 an' 2009 follaein the bringin' in o' the 'Appen Lifts' 'greement atween the US an' the EU. Tourism Airlan wul bae airtin hits meercetin daeins aa the tap 15 DMA's (District Metropolitan Airts) at houel the heighest concentration o' the islan's bes' chansts. Oor messages wul bae mair compellin' an' we wul airt oorsels aa bein' mair efficient i oor uise o' traditional an' new media.

Efter oor review o' New an' Forderin Meercets oor airtin wul bae oan risin' oor meercet shaire fae unnerfordered lang haul meercets laike China, India, Japan an' Sooth Africa, sim o' thaim bein' the quaakest grawin meercets i the worl'. We wul airt oorsels forebye aa the gulf Cooperation Kintras oan accoont o' direct access chansts an we wul forder a 'virtual' presence oanline i wee'er meercets fer tae pave the wie fer grawin i tims tae cum.

#### ***10.2 Norlin Airlan Strategy***

We wul cairry oan deliverin' oan thon pairt o' oor remit bae heftin Norlin Airlan haird i the context o' the islan' o' Airlan. We wul cairry oan maakin an' deliverin' an airted owre seas meercetin programme alang wi' the Norlin Airlan Tourist Boord, the tourism industry i Norlin Airlan an' the thrade i oor target meercets. Amang thae missures wul bae:

- Featurin' Norlin Airlan i the fu' range o' islan' o' Airlan meercetin.
- Cairryin oot tactical meercetin tae heft Norlin Airlan I chusen meercets fer tae move consumers fae intherest tae buyin'.
- Encouragin' mair taakin pairt bae Norlin Airlan industry i owreseas meercetin bae incentives.
- Waarkin wi' the Norlin Airlan Tourist Boord tae cairry oot thair strategy an' heft the Signature Projects an' Winnin' Themes.
- Cairry oan wi' oor Car Tourin'/Langer Holiday campaign i Great Britain tae get a ris' i lengtht o' stey.
- Leukin aa the intherest i Norlin Airlan wi' oor Brand Trackin' research at wul test the minin o' advertisin' amang customers o' oor advertisements onie adae wi' Norlin Airlan.
- Uisin the chansts gien bae the announcements lately bae Aer Lingus, Ryanair, Easyjet, an Jet2 forebye existin' levels o' access.

### ***10.3 Airt Strategy***

The spread o' tourism through the differ airts bes yin o' the maist pressin' issues theday i the Sooth. Hit hes shifted ayont a "Aist vs West" consairn tae tak oan a clear "Kintra vs Toon" dimension. Consumer patterns hae driv' thon shift wi' the shift tae shoarter breks an' mair uise o' the Inthinternet an laigh-cost carriers. Proof o' thon shift can bae saen i the ris' i Inthinternet bookins maide bae visitors fer shoart breks tae key cities an' toons at hae direct access. Tourism Airlan wul ettle aa cairryin oot specific airt meercetin daeins tae deliver oan thon. The Strategy wul tak' in:

- Featurin' airts i the Sooth an' kintra attractions i the fu' range o' islan' o' Airlan meercetin.
- Cairryin oot tactical meercetin tae heft "things tae bae aa" i the differ airts i the Sooth.
- Cairryin oot specific campaigns at wul focus oan themes fae the airts.
- Cairryin oan wi' oor CarTourin'/Langer Stey campaign i Great Britain tae encourage a ris' i lengtht o' stey.
- Waarkin wi' Failte Airlan an' the airt boords i Dublin an' Shannon tae forder co-ordinated airt strategies tae dhrive graith.
- Waarkin wi' Failte Airlan tae cairry oot thair product strategy an deliver oan thair promotions an' publicity programmes.
- Waarkin wi' the West o' Airlan/Shannon Airport tae heft the west i the efter Appen Lifts era.

### ***10.4 Access Strategy***

The islan' o' Airlan bes mair needfu' o handy. Keen an' direct access services nor maist ither kintras. Monie o' oor European rivals hae a when o' trevel chuses(laike air, sea, rail an' road), quyhles the islan' o' Airlan hes tae rely oan air an watter. Quyhles thair ir a roughness o' guid cless an' heigh capacity o' sea routes fae Great Britain we ir highly dependent oan air access at bes the chusen wie o' trevellin fer about 80% o' visitors. The mair at air services hae mair meercet shaire nor access bae watter thair ir signs about hoo sea access bes recoverin'. I the lif' o' the Corporate



Plen 2005 – 2007, we hae ettled tae grow the car-brought meercet, quyhles ferries hae rebiggit thair business tae bae fit tae compete wi' the laigh price carriers.

Access forderin bes gye needfu' no onie fer tourism graith bit fer regional an Norlin Airlan forderin forebye. We wul cairry oan finnin an' uisin meercetin chansts cummin ootae mair direct, handy an keen services. Tourism Airlan's access airtin fer 2008 – 2010 wul tak in:

- Uisin the chansts fae access levels we hae the noo alang wi' finnin an' uisin meercetin chansts i tims tae cum.
- Finnin air an' watter access gaps an' waarkin wi' carriers tae fill thaim.
- Unnertaakin co-operative meercetin fer strategically important routes, maistly thaim gien access tae Norlin Airlan an' tae the airts.

### ***10.5 Thrade Strategy***

Sine tourist boords maistly dinnae hae onie products ir services o' thair ain, they hae need fer industry pairtners tae gie the hook at wul get consumers fer tae beuk a holiday. Tourism Airlan bes airted aa taakin thaim at micht cum tae the point o' buyin' an waarkin i co-operation wi' the industry tae forder pletfoarms fer thaim tae gie buyable products tae consumers. Owre the cummin thrie yeirs Tourism Airlan wul airt aa gien industry pletfoarms at ir keen, relevant an' enticin' sae es the customer wul think about buyin' a holiday oan the islan' o' Airlan.

The airtin o' the industry strategy fer 2008 – 2010 wul hae:

- Gien apt chansts an' pletfoarms at wul encourage mair industry taakin pairt i events.
- Gien integrated oan an' affline meercetin pletfoarms fer the industry, fae Airlan an' owre seas, tae let thaim stimulate intherest an' dhrive buyin'.
- Uisin the maist apt an mintit newins meercetin channels tae heft the islan' o' Airlan's products.
- Leukin fer mair taakin pairt i owre seas meercetin daeins bae the Norlin Airlan thrade.
- Gien insicht an' airtin tae the thrade about products an' meercetin channels at wul waark fer thaim i owre seas meercets.

### ***10.6 Advocacy Strategy***

Tourism Airlan wul ect es an advocate fer customers fae owre seas bae communicatin' tae the industry the forderin an' wrochtin oot o' the Airlan brand, needs o' consumers an' trends, forebye the notion about the tourism experience oan the islan'. We wul strangly leuk tae forder synergies wi' ither public boadies i sectors laike thrade, investment an' heirskep heftin. We wul wrocht alang wi' the twa government boadies, Failte Airlan an' the Norlin Airlan Tourist Boord, tae gie clear messages tae the industry.

Oor advocacy strategy fer 2008 – 2010 wul bae airted aa:

- Gettin' the industry tae wrocht oot new, true bill, enrichin' an' min'able experiences i line wi' consumer demand.
- Gettin' the industry tae cluster product fer tae gie the consumer a baag range o' things tae see an' dae.
- Waarkin wi' the tourism boadies an' ithers tae dale wi' onie potential issues adae wi' qualitie o' product an' tae forder products at appeal specifically tae sicht seers an' Heirskeip Seekers.
- Getting the tourism boadies an' the industry tae houl oantae the wairmth o' the welcum bae better trainin' an' forderin.
- Monitorin' consumer feedback adae wi' price an' structure.
- Leukin fer the betterment o' physical infrastructure oan the islan' o' Airlan.
- Monitorin' consumer consairns adae wi' the worl' environment, climate altheration an the pittin oot o' carbons tae see gif they hae onie impact oan decisions adae wi' trevel owre seas.

### ***10.7 Fitness Strategy***

Tae deliver oan the targets an' strategy Tourism Airlan wul hae need fer fowk, systems an wies o' waarkin at ir dynamic an' flexible an can alther i the day's quaak movin' business environment.

We wul cairry oan airtin aa empouerin the organisation tae deliver the strategy bae forderin oor fowk, aptly leukin aboot oor catter resourses an' uisin new technology an' wies o' waarkin. Tourism Airlan wul:

- Bring in oor oangaein organisational review, airted oan hirin, houldin oantae an' forderin oor fowk.
- Gien efficiencies bae better uisin oor technology i baith day tae day waark an' i cairryin oot oor baag meercetin programme.
- Gien velue fer catter bae allus eveluatin an' maakin better oor daeins

## **11 Corporate Programme**

Tourism Airlan wul unnertak a corporate programme o' centrally based ections tae deliver enablin' mechanisms fer gettin' tae oor ambitious targets. Fer the 2008 – 2010 Corporate Plen Tourism Airlan wul leuk tae get the follaein fae hits corporate programme.

### ***11.1 Fowk***

Tae gie worl' cless meercetin programmes an organisation wul hae need o' the richt fowk, daein the richt joabs aa the richt tim'. Tourism Airlan sees hoo thaim at wrocht tae hit ir hits baaggest resource an' bes committet tae investin i skeels adae wi' owresicht an' meercetin. Bae oor Organisational Reviews , Tourism Airlan hes biggit in flexibility baith i hits daeins an' hits meercetin tae repone tae onie altherations at wul bae needfu' i tims tae cum.

Mair nor seiventy percent o' oor fu' tim' staff, graduates, students an' general sellin' agents wrocht tae deliver oor differ meercetin programmes i oor owreaseas offaices. The rest o' oor waarkers wrocht i oor offaices i Dublin an' Cowlraine aa enablin' roulls at tak in Norlin Airlan, airt an access forderin, e-meercetin, distribution, customer speirins, wittens communication technology, strategy forderin an' insights, catter, corporate an' industry communications, fowk an' meercetin communications.

New challenges wul cum ap es environmental faictors impact oan fowk an' the organisation owre the lif'tim' o' this plen. We hae carriet oot oor secon' organisational review tae mak' siccar at Tourism Airlan hes the needfu' skeels tae repone tae meercet altherations i the cummin yeirs. We wul bring in the finnis o' the review owre the tim' o' the corporate plen.

Tourism Airlan bes airted aa maakin betther oor performance heirskeip bae a management forderin programme an bae uisin oor 'U Perform' performance owresicht system an' competency framewaark. We wul cairry oan investin' 4% o' oor yeirly pey budget i skeels forderin i airts laike meercetin an' technology skeels. Trainin' programmes ir offaired tae staff aa ivry level o' the organisation. We wul cairry oan cairryin oot oor management forderin programme wi' unco emphasis bein placed oan leadership an' resource owresicht skeels.

### ***11.2 Owresicht o' Catter***

The catter system wul bae fordered mair tae mak' siccar o' the oangaein stewardschip o' prugh. Effective cairryin oot o' risk owresicht an' inby audit programmes wul cairry oan bae liason wi' the Risk Owresicht Committee.

### ***11.3 Corporate Governance***

The Boord wul cairry oan dhrivin the heighest stannarts o' corporate governance i Tourism Airlan accordain tae the steerins gien bae the NSMC. The thrie yeirs pas' hae saen the company forder the verra heighest stannarts o' corporate Governance, quyhles a Risk Owresicht wie o' waarkin hes bein tuk oan forebye. The inby audit function wus outsourced an hit reports affen tae a Risk Owresicht Committee, at bes a sub-committee o' the Boord. The mair, regular maetins ir hel' wi' sponsorin' government depairtments fer tae taak aboot issues adae wi' baith jurisdictions. A revised catter memorandum hes bein' tuk oan, taakin intae accoont the latest fordere an' experience i baith jurisdictions. The cummin thrie yeirs wul see mair fordere includin':

- Biggin oan existin' relationships wi' hits sponsorin' Depairtments, Catter Depairtments an' the Noarth Sooth Meensterial Cooncil tae mak' siccar compliance bes fordered i line wi' corporate governance needs i baith jurisdictions.
- Cairry oan forderin an' wrochtin oot the financial memorandum fer the Company.

### ***11.4 Strategy Forderin an' Insights***

Worl'wide tourism wul cairry oan evolvin' i wies at ir haird tae predict owre the cummin thrie yeirs an Tourism Airlan wul gie steerins tae the industry i this tim o' altherations bae strategic insights an leadership forebye shairin the bes' meercetin prattick tae let the islan' cairry oan grawin aheid o' Worl' an' European levels. Tae bae a leadin' edge destination meercetin organisation we wul benchmairk oorsels agin the bes' i oor fiel'.

We wul heft i deliverin' oan the ambitious targets through the depth o' insights oan bes'-chanst meercets an' customers an' the meercet environment. We wul review oor existin' segmentation focus tae mak' siccar at we ir still airted aa the richt customer. We wul realign oor message an' oor daeins tae reflect the airts o' baagest potential fer catter an' visitor graith.

We wul gie steerins tae the industry, Failte Airlan an' the Norlin Airlan Tourist Boord oan airts o' owre seas chansts an' heft product an' service giers tae get tae owre seas customers.

### ***11.5 Corporate an' Industry Communications***

Tourism Airlan wul cairry oan forderin communication channels wi' the twa national tourist boadies an' oor industry pairtners oan the islan' o' Airlan an' i the meercetplace. Thon wul include betther uise o' wittens an' communications technology laiike an industry extranet an' a corporate wabsteid.

Oangien industry hefts fer oor meercetin programme bes gyely important, bae baith thaim based i Airlan an' owre seas. We wul keep ap guid communications bae the Tourism Meercetin Partnership(TMP) an' ither channels tae mak' siccar at the notions o'key stakehoulders ir biggit intae oor plennin.

Tourism Airlan bes committed forebye tae oangaein forderin o' the organisation's corporate profile oan the islan' an' owre seas.

Mair nor thon we wul cairry oan gien a quaak an' efficient service tae oor sponsorin' Government Depairtments adae wi' Parliamentary/'Semmeli speirins an wittens briefins.

### ***11.6 Process an' Systems***

Tae gie a worl' cless meercetin programme an organisation maun hae the apt processes an' systems i place. Technology bes movin' gyely quaak an' Tourism Airlan needs tae forder meercetin tools tae let is repone tae thae altherations. Owre the cummin thrie yeirs we ir committit tae deliverin':

- Gien chansts fer consumers tae repone tae oor campaigns bae the contact centre via caas, epoasts an new mintet wies o' contact. We wul get forebye an' cairry oot a new Customer Relationship Owresicht fer the organisation at wul heft oor customer engagement strategy.

- Maakin an' pittin oot Tourism Airlan's consumer publications laike the main meercet beuk an' product guides in baith prent an' digital media tae consumers an' tae owreaseas promotions an' consumer shews.
- Gie a central direct meercetin' service includin' campaign design, execution an' owresicht tae thae meercets at hae need fer hit, quyhles gien forebye a forum fer bes' prattick an' direct meercetin caase studies tae the wider organisation.
- Oangaein betterments tae oor Wittens Communications an' Technology infrastructure an' systems.
- Gien a central E-Meercetin team tae baith hae owresicht o' the wab forderin an' forder e-meercetin assets at wul bae o' uise i oor owreaseas meercets. The team wul gie a forum fer bes' prattick an' wul bae a centre o' excellence i forderin oor organisation's skeels.

### ***11.7 Offaice Netwaark***

Tae compete i the mair an' mair keen worl'wide meercetplace, Tourism Airlan wul cairry oan evaluatin oor meercet an' heid offaice operations tae mak' siccar at aa depairtments ir weill organised an' situated tae mak' maist o' the chansts i oor owreaseas meercets.

Owre the tim' o' this plen we wul bae bringin' oot the New an' Forderin Meercets Strategy, at wul see mair forderin o' oor netwaark i Asia includin' appenin a Tourism Airlan Asian hub offaice. Ither altherations tae oor netwaark wul cum aboot oan a caase bae caase basis an' wul bae eveluated accordain tae oangaein business needs.

## **12. Gear Needs**

Wittens ir bein' finished aff bae the Government depairtments.

## 14. Enn

Tourism bes a needfu' industry fer the island o' Airlan oan a wheen o' differ levels – economically, socially, spatially an i terms o' heirskeip. Hit hes bein gyely important i keepin' ap locail economies an' nummers o' fowk aa owre tie islan' o' Airlan.

Hit adds tae the amoont o' consumer spennin, sae maakin mair business fer a clatter o' differ consairns. Hit hefts heigh levels waarkin athwort the hale economy. Hit ect's tae heft the balance o' payments. Tae enn wi' hit maks fer gye baag amoonts o' tax earnins fer the exchequers.

Bae sellin Airlan oan a aa islan' basis an' bae uisin quhat baith the Noarth an' Sooth hae tae offair the consumer, tourism the noo bes fit tae offair a fu'er proposition. I the context o' the aa islan' economy, tourism hes bein saen tae bae yin o' the key industries at wul gie real ootcums at wul bae fit tae bae missured.

Owre the lif'tim' o' this Corporate Plen 2008 – 2010, hit bes expectit at the islan' wul hae maide catter fae tourism o' aboot E15.7/£10.5 billion an' gie atween 29.5 an' 30.2 million visitors an' atween 13.7 an' 14.1 million promotable visitors.

Tourism Airlan houls the saime notion es the industry oan the islan' an' the governments, baith Noarth an' Sooth, at tims tae cum leuk bricht an' at challenges wul bae met, wi' tourism catter an' nummers o' visitors cairryin oan ootperformin European an' Worl' levels fer es far aheid es can bae saen.

The keys tae thon success ir:

- Cairryin oan wi' investment bae baith Public an' Private sectors.
- A niver ennin focus oan competitiveness.
- Furst cless heftin tae mak' siccar o' competitive stan'oot.

The cairryin oot o' this plen, alang wi' ither policy fordors at ir unnerwie bae the tourist boards an' baith governments, wul heft the industry i' gettin' tae oor targets an' i biggin the pletfoarm fer een baager inroads intae worl' meercet shaire i the yeirs aheid.