

Summary of our 2013 Marketing Plans

2013



Tourism Ireland Marketing Plans 2013

Summary

Global Outlook for Tourism in 2013

The slow pace of global economic recovery continues to weigh heavily on tourism internationally. Independent analysts report that uncertainty caused by the Eurozone debt crisis is having an increasingly severe impact on the German, French and GB economies. It's anticipated that GB, US and Europe will therefore achieve only moderate growth this year, while global tourism to Western Europe in 2013 is expected to decline by -1%. Tourists are likely to remain cautious and short-haul regional and domestic tourism will retain a high share of total tourism demand. High growth rates in global outbound travel are unlikely until 2014 or 2015.

Targets for 2013

The external economic environment remains turbulent, particularly in key source markets. Nevertheless, Tourism Ireland is targeting an increase in visitor numbers for the island of Ireland and for Northern Ireland. It is anticipated that strong economic dividends accruing from promotion of The Gathering Ireland 2013, Derry~Londonderry UK City of Culture and other major events will help to counter the difficult economic environment and deliver visitor growth for both jurisdictions.

Highlights for 2013

2012 saw a review of both the GB and US markets, and the development of new marketing strategies on the back of those analyses. 2013 will begin with a transformed consumer web experience as we roll out our new domain, Ireland.com. We have also reviewed our six strategic marketing priorities – Targeting and Communications, Brand, Channels, Northern Ireland, Trade and Industry and Access – to ensure that they are still fit for purpose.

Two key opportunities lie at the heart of Tourism Ireland's promotions for 2013 – The Gathering Ireland 2013 and Derry~Londonderry UK City of Culture; these, together with a year-round programme of innovative promotion in over twenty markets across Great Britain, North America, Mainland Europe and Australia and Developing Markets, will underpin our growth ambitions for 2013.

The Gathering Ireland 2013

The Gathering Ireland 2013 is a year-long celebration of all that is great about Ireland and Tourism Ireland has already been promoting it extensively overseas – with a series of high-profile Ministerial launches in key markets around St Patrick's Day and through the autumn; an intensive programme of engagement with Gathering 'enablers' and Irish business networks; as well as promotions to overseas travel trade contacts and consumers in the second half of 2012. We are taking a multifaceted approach to this task, working with a wide range of partners to maximise the economic potential of the event.

In particular, we will encourage the Diaspora in places like GB, US, Canada and Australia to come home in 2013. We will work with embassies and Irish networks to create Gathering opportunities, and with industry partners to facilitate a strong presence for The Gathering Ireland 2013 in the marketplace throughout the year. The Gathering will be highly visible across all our marketing activity – on and offline – including advertising, direct marketing, emarketing promotions, publicity and social media. Festivals and events will be used to drive interest at trade and consumer events.

Derry~Londonderry UK City of Culture

Derry~Londonderry UK City of Culture provides a unique opportunity for a year-long focus on the city and its environs as it showcases a diverse, world-class range of cultural programmes and events, aimed at both cultural tourists and general visitors. This will help put the North West on the global tourism map in a new way. Tourism Ireland will leverage the increased levels of awareness and interest generated overseas by ni2012 in promoting Derry~Londonderry UK City of Culture across the world in 2013.

Tourism Ireland will promote Derry~Londonderry UK City of Culture extensively in campaigns across our markets, harnessing strong, positive imagery to convey the broad appeal, richness and depth of the events programme and the attractions of the area. The primary aim will be to drive increased interest in Northern Ireland and create a sense of urgency to visit in 2013. The event will remain at the forefront of all our marketing activity throughout the year, including co-operative marketing with key industry partners. It will be incorporated, along with the World Police and Fire Games, the G8 Summit, Titanic Belfast, the Giant's Causeway, key festivals and signature projects, into all our promotional activities for Northern Ireland.

GB Market Review – GB Path to Growth

With economic conditions remaining difficult in the GB market, a root-and-branch review of the market was undertaken during 2012, involving a coalition of tourism agencies and key market and island of Ireland-based industry representatives. A new strategy 'GB Path to Growth' has been developed to return the market to sustained growth, beginning in 2013.

The primary focus of the plan is on winning market share from GB domestic destinations and top European competitors. We will also implement a new segmentation model focused on targeting the three distinct segments identified as being the best prospects for growth.

In the first quarter, we will focus on the Social Energisers, the younger consumers who seek shorter, high-energy, urban breaks. The 2013 campaign will also reach out to the second target segment, the Culturally Curious. These are slightly older travellers who seek landscapes, history and culture. The third target segment for GB – the Great Escapers who are looking to take time out and to re-connect with their partners and with nature – will be targeted through PR activity. We will also strengthen the brand proposition by packaging or bundling holiday experiences to inject excitement and 'new news' and to move GB consumers from just considering a visit to the island of Ireland to actually booking one. We will also create a strong value for money proposition that challenges current value perceptions and leverages positive word of mouth. Northern Ireland will be promoted as a 'must see' destination.

US Market Review

The island of Ireland's performance in the US market has bounced back strongly over the last two years. Our market share of US outbound travel to Europe is at or near its highest ever levels, and the market continues to deliver large numbers of high value travellers. Given the strategic importance of the US market, we cannot afford to take this improvement for granted. We therefore undertook a review of the US market in 2012, with a view to identifying what will drive enhanced growth in the future and allow the island of Ireland to pull ahead of the pack.

The focus of the three-year plan 'Make Ireland Jump Out' is to win an increased share of outbound travel to Europe, moving from circa 9% market share to 11% by 2015. We have refined our consumer segments and our marketing activity will position the island of Ireland as an aspirational, iconic and accessible holiday destination that our US target consumers are highly motivated to visit. Promoting

across all digital platforms will also be a priority. We will build on the legacy of ni2012 through publicity, trade and social media activities, to create a sense of urgency around visiting Northern Ireland in 2013.

Mainland Europe Priorities

Mainland Europe now delivers more holidaymakers and revenue than any other market area. In spite of the ongoing Eurozone debt crisis, we are confident that we can deliver further growth from core European markets in 2013. Resources will be prioritised in the top two markets, Germany and France, followed by Italy, the Nordics, Spain and the Netherlands. Engagement with our target consumers will be driven through social media, our new interactive website and innovative digital campaigns that will also increase positive word of mouth about the island of Ireland. In addition, The Gathering Ireland 2013 and Derry~Londonderry UK City of Culture will be promoted prominently and will be integrated into mainstream and co-operative partner campaigns from the end of 2012 through 2013.

Australia and Developing Markets Priorities

Compelling localised messages will target key segments in these markets. We will work with the travel trade, airlines and industry partners to highlight ease of access under the visa initiative and exploit opportunities created by the growing number of routes from the Middle East that have good connectivity for Australia, India and China.

Transforming our Consumer Web Presence

Our newly developed suite of websites will significantly enhance the experience and functionality available for those researching, planning or booking a holiday on the island of Ireland. The re-development has been designed to capitalise on the growing importance of the internet in travel and holiday planning and to harness the phenomenal growth in social media. The new website will support 11 different languages and over 30 individual markets.

The new sites will be a vital platform for Tourism Ireland to communicate with customers around the globe, showcasing the superb tourism product on offer and the many things to see and do around the island of Ireland. They will also have a transformational impact on consumer targeting and provide industry with more qualified leads to help them to 'close the sale'. A new domain name, Ireland.com, will deliver greater 'stand-out' for the destination around the world and will help deliver efficiencies in terms of promotion and search engine optimisation. The new sites will greatly extend our reach and will ensure greater engagement with a much broader global audience.

Access

Convenient, competitive air and sea access is critical to the development of the tourism industry across the island of Ireland. We will continue to work with government agencies and departments to make the case for route expansion and development. Our extensive co-operative marketing programmes with air and sea carriers and tour operators will continue in 2013.

In Summary

Despite the uncertainty surrounding the pace of economic recovery in key source markets for tourism to the island of Ireland, Tourism Ireland believes that the implementation of its 2013 Marketing Plans can increase visitor numbers to the island and to Northern Ireland over the course of the coming year. We will continue to work closely with our tourism industry partners at home and overseas to achieve our common objectives and help drive economic regeneration. Overseas tourism contributes in the region of €3.6/£3.1 billion each year to the economies on the island of Ireland and helps to sustain around

200,000 jobs.