

A strategy for achieving tourism growth from Great Britain to the island of Ireland 2019 → 2025



Foreword

As our closest neighbour, Great Britain continues to be incredibly important for tourism to the island of Ireland. I am delighted to have led the GB Market Review, which has identified the significant economic lifetime value of the holidaymaker from GB. GB holidaymakers continue to offer a huge opportunity to the island of Ireland. By collectively delivering the actions outlined in this review, holidaymaker revenue from GB has the potential to grow by 25% to the island of Ireland by 2022. This is 33% in Northern Ireland and 24% in the Republic of Ireland.

The review has been a truly collaborative project, bringing together expertise from across the tourism industry, both on the island of Ireland and in Great Britain. I would like to thank everyone involved for their generosity of time, particularly my vice-chair Katy Best, Commercial and Marketing Director of Belfast City Airport, and members of the Steering Group, who have invested significant time and provided invaluable input. I would also like to acknowledge the collaborative approach of the three tourism agencies on the island of Ireland, Fáilte Ireland, Tourism Northern Ireland and Tourism Ireland, who have worked closely together with industry to deliver this plan.

Capitalising on the findings of the review will require commitment from the whole tourism industry across the island of Ireland, the tourism agencies, our partners in GB and the Department of Transport, Tourism and Sport, the Department for the Economy and other government departments in Ireland and Northern Ireland. We look forward to working together to achieve this success.

Stephen McNally

Chair of the GB Market Review

Deputy Chief Executive, Dalata Hotel Group

**“GB HAS THE POTENTIAL TO GROW
HOLIDAYMAKER REVENUE BY 25% TO
THE ISLAND OF IRELAND BY 2022. THIS
IS 33% IN NORTHERN IRELAND AND 24%
IN THE REPUBLIC OF IRELAND.”**



Why the GB market is so important

Great Britain has provided significant growth over recent years, with holidaymaker revenue to the island of Ireland growing 46% between 2012-2017; with Northern Ireland seeing growth of 86% and 39% growth in the Republic of Ireland.

In 2017 there were 1.6m holidaymakers from Great Britain to the island of Ireland, spending €538m/£468m. This represents 31% of all holidaymakers to the island of Ireland and 18% of all holidaymaker revenue.

GB holidaymakers venture outside of the main cities and tourism hotspots, supporting regional growth and season extension by visiting lesser known locations and visiting throughout the year. It is in recognition of the value of GB holidaymakers that we have undertaken this comprehensive review to identify how we can achieve further growth.

The last GB Market Review took place in 2012, when the focus was on the successful recovery of the GB holidaymaker market following the 2008/9 global economic crisis. The targets set out in the 2012 review were exceeded, with growth in visitor numbers of almost 950,000 between 2013 and 2016. The GB market is strong now, but it is also experiencing a time of considerable uncertainty following the United Kingdom's decision to leave the European Union.

This review has been mindful of the Brexit/EU Exit negotiations throughout. The strategic recommendations remain valid and can be flexed under all potential outcomes of these negotiations. The Irish Government's Tourism Action Plan (launched in December 2018) supports the completion and implementation of the findings of this GB Market Review. This strategy is consistent with the tourism ambitions as outlined in the Industrial Strategy for Northern Ireland: Economy 2030.



Island of Ireland **The numbers** (2017)

1.6m

GB holidaymakers to the
island of Ireland

€538m/£468m

is the total spend by
GB holidaymakers across the
island of Ireland

Almost one fifth

of all holidaymaker revenue
comes from GB visitors

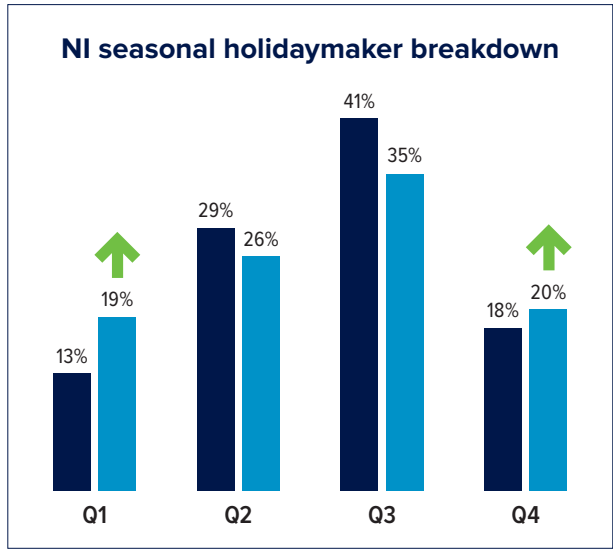
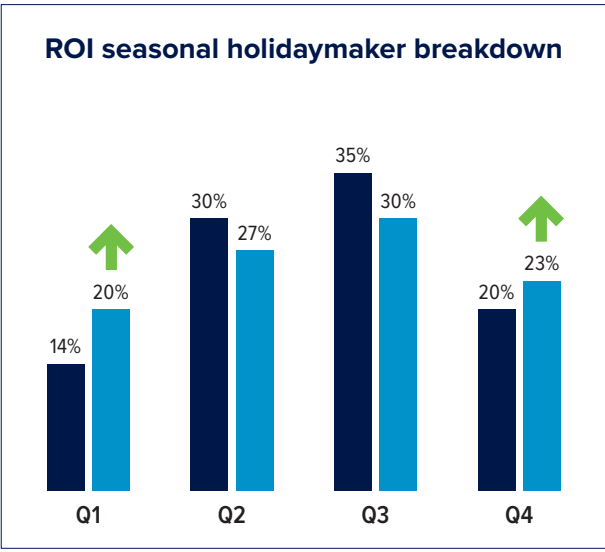
42%

GB holidaymakers visit between
October and March

**“GB HOLIDAYMAKERS
YEAR FOR SOMETHING
‘REAL’, THEY SEEK AN
AUTHENTIC EXPERIENCE
THAT IS EASY – DIFFERENT,
BUT NOT DIFFICULT.”**



Season extension: the GB holidaymaker has a higher propensity than other holidaymakers to visit during Q1 and Q4.



■ Total holidaymakers ■ GB holidaymakers

■ Total holidaymakers ■ GB holidaymakers



Research and insights that informed this review

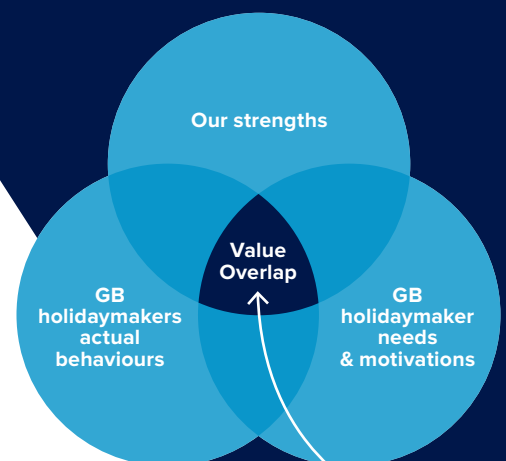
The goal is to increase holidaymakers and holidaymaker revenue from GB.

The strategy to achieve this was developed using an evidence-based approach, including:

- A comprehensive review of existing data and research on actual behaviour of GB holidaymakers to the island of Ireland.
- Bespoke research into GB holidaymakers' needs and motivations to visit the island of Ireland.
- Consultation with tourism industry professionals and thought leaders in four workshops held on the island of Ireland and in London to identify our strengths and challenges.

All the information was assessed to identify where the island of Ireland's strengths overlap with GB holidaymakers' needs and behaviours. This 'value overlap' is the area to focus on to maximise the potential of the GB holidaymaker.

EVIDENCE BASED APPROACH



Objective:
To increase GB holidaymakers & holidaymaker revenue 2019-2025

The GB holidaymakers visiting the island of Ireland

Who they are and how they behave on a trip to Ireland

- Culturally Curious and Social Energisers remain the best prospect segments – there are 4.5m Culturally Curious and 3.3m Social Energisers in GB.
- 92% of GB holidaymakers are independent travellers.
- 65% of holidays take the form of a short break of up to 5 nights.
- 66% travel with their partner or small adult group (1-3 people).
- 57% (Ireland) / 53% (Northern Ireland) are on a repeat trip to the island of Ireland.
- 42% travel between October and March – they see the island of Ireland as a year-round destination and many are happy to travel at any time of the year.

Lifetime value of the GB holidaymakers

GB holidaymakers return to the island of Ireland time and time again. And when they come back, they tend to be more adventurous than on a first visit; repeat holidaymakers are more likely to come for longer, spend more and venture beyond the cities into the regions.

It is the GB holidaymaker's propensity to visit the island of Ireland many times that makes their lifetime value so significant to the tourism economy. To maximise the potential, we can all play a role in building relationships with the GB holidaymaker, encouraging them to come back to the island of Ireland again and again.

While the first-time holidaymaker is most likely to come for a city break, when on a return visit a GB holidaymaker is more likely to have a car, travel by ferry, visit the regions and stay longer.

	First time Holidaymaker	Repeat Holidaymaker
Average nights spent*:	3.6	4.9
Average spend*:	€328 / £285	€354 / £308
Regional nights:	54%	78%
Ferry service:	17%	40%
Car used:	28% (14% hired)	51% (18% hired)
Travel October – March*:	48%	37%

Source under box: Survey of Travellers, Fáilte Ireland, 2017 – A survey of holidaymakers leaving ROI ports.
*Indexed to island of Ireland data.





ROADMAP TO SUCCESS

A strategy for achieving growth from Great Britain 2019 → 2025

Ambition

Increase holidaymakers and holidaymaker revenue while driving regional growth and season extension. Meeting this ambition offers the potential to increase holidaymaker revenue across the island of Ireland by 25%. This is 33% in Northern Ireland and 24% in the Republic of Ireland.

Strategy

Unlock the potential of the **lifetime value of GB holidaymakers**.

This means bringing new holidaymakers to Ireland and Northern Ireland who are likely to have short urban holiday experiences, and recognising the importance of repeat visitors, who are more likely to travel across the island of Ireland and stay longer.

Our roadmap to success

- | | | | |
|--|--|---|--|
| <p>1.
Identify and build ongoing relationships with GB holidaymakers.</p> | <p>2.
Tailor communications more specifically to the GB holidaymakers' needs.</p> | <p>3.
Create hub experiences with compelling reasons to venture beyond Dublin and Belfast.</p> | <p>4.
Further develop appropriate access to and within the island of Ireland to support short breaks.</p> |
|--|--|---|--|

UNDERPINNED BY INDUSTRY COLLABORATION AND ACTIVATION

OUR ROADMAP TO SUCCESS

1. Identify and build ongoing relationships with GB holidaymakers

GB holidaymakers are very warm to visiting the island of Ireland and come back many times. More than half of GB holidaymakers (57% in Ireland/53% in Northern Ireland) are not on their first visit. Those returning tend to stay longer and spend more than those on a first trip, and they tend to venture beyond the main cities and tourism hotspots. Therefore, 'repeat holidaymakers' are a valuable group to be nurtured.

In order to encourage more repeat visits, we need to get closer to our first-time visitors and build relationships with them, encouraging them to come back again and maximising their lifetime value to the island of Ireland. Relationship building is an action that can be undertaken across the industry, both on the island of Ireland and through communications in GB. We can all communicate a consistent message of welcome, with messages such as 'Next time you come, why don't you...'

It's vital we offer and are perceived to offer good value for money. As sterling is the currency of Northern Ireland, it has a clear value proposition to GB holidaymakers. As euro is the currency in Ireland, a conversion is required, so it is important to maintain a focus on delivering high quality experiences at a reasonable cost.

We will do this by...

Supporting the industry

- Enhance industry development programmes by providing new insights on generating revenue from GB holidaymakers. The programmes will share the value to local areas from the GB holidaymaker, the difference in behaviour between first-time and repeat holidaymakers, and suggestions for developing relationships to encourage holidaymakers to come back again.
- Develop Customer Relationship Management (CRM) initiatives to support industry in building relationships with GB holidaymakers and encouraging them to return.
- Work with industry to identify and target previous holidaymakers with offers and ideas.
- Share insights and learnings with GB tour operators who already excel in building relationships with repeat holidaymakers, and continue to deliver joint marketing activity.

Communicating with GB holidaymakers

- Integrate the insights of the lifetime value of the GB holidaymaker into marketing campaigns. For example, an email marketing strategy that tailors messaging, inspiration and offers to the first-time holidaymaker and repeat visitors.
- Identify opportunities to incorporate messaging, such as "Next time you come, why don't you..." into communications for visitors both during and following their holiday.
- Build a digital communications strategy to support the lifetime value of the GB holidaymaker.
- Develop a joined up digital prospect management approach using emerging capabilities to strengthen the actions of all three tourism agencies.
- Monitor trends and insights in the GB market, both for holidays to the island of Ireland and Northern Ireland.

Focusing on island of Ireland competitiveness

- Communicate the value for money offered by the quality of experiences available on the island of Ireland and world-class customer experience.
- Communicate that pound sterling is the currency used in Northern Ireland – offering the GB holidaymaker good value for money.
- Develop a programme of cost and revenue management initiatives that enable industry on the island of Ireland to offer even better value to GB holidaymakers.



2. Tailor communications specifically to GB holidaymakers' needs

Culturally Curious and Social Energisers continue to be the best prospect segments in Great Britain. They are open to visit any time of year, so there is a clear opportunity to encourage off-season city breaks for first-time visitors. As repeat holidaymakers are especially open to visiting the regions, staying longer and using a car, there are also opportunities to encourage shoulder season holidays and activity-based experiences such as golf, cycling and walking. The GB holidaymaker has a wealth of choice, so the importance of being present and top-of-mind is crucial to maintain a competitive position.

What GB holidaymakers want

Needs and motivators for GB holidaymakers coming to the island of Ireland

Qualitative research was conducted with GB holidaymakers who had recently visited the island of Ireland or had a trip coming up. The research identified key motivators and triggers for booking that trip:

- Increasingly, choosing a destination and planning a trip is something that people do together. This is often triggered by 'snippets' – compelling visual ideas or experiences in video or picture form that can be shared online with friends and partners. There is a growing trend for snippets to be the starting point or the trigger for further research around a potential holiday destination. We must tap into this shared planning aspect of the holiday to ensure that the island of Ireland is on GB holidaymakers' consideration list.
- Importance of the ease of access – GB holidaymakers consider ease as crucial for a short-break. For example, they are looking for a destination they can reach in under two hours and airline schedules that fit a weekend break.
- Authentic living culture – GB holidaymakers yearn for something 'real'. They want to have an authentic experience, not something that they perceive to be put on for tourists.

The island of Ireland must demonstrate the ability to deliver on all of these areas in order to grow the market.

WHAT GB HOLIDAYMAKERS WANT

EASY – DIFFERENT, BUT NOT DIFFICULT
SOFT ADVENTURE, INCLUDING WALKING OR BOAT TRIPS
URBAN OR RURAL SETTINGS
WORLD-CLASS QUALITY
UNIQUE EXPERIENCES, NOT JUST ATTRACTIONS
AUTHENTICITY
RELAXING AND WELCOMING VIBE

We will do this by...

Supporting the industry

- Deliver Industry Digital Development Programmes for businesses to improve their digital presence, so they can be in the right place at the right time with the right content.
- Encourage industry investment to achieve a collective weight of communication, putting the island of Ireland firmly top-of-mind.
- Develop a framework that assists industry in dovetailing with marketing campaigns being delivered in Great Britain to maximise our collective impact.
- Fáilte Ireland and Tourism Northern Ireland to work with industry to develop GB-specific regional and seasonal products, experiences and propositions for Tourism Ireland to promote.
- Encourage industry to provide tactical offers that are linked to partner and Tourism Ireland campaign activity in GB, and to ensure a strong call to action that triggers booking.

Communicating with consumers

- Tailor marketing communications to GB holidaymaker needs and motivations including:
 - Focus on authentic living culture.
 - Promote ease of access.
 - Develop visually impactful and shareable 'snippets' that we know are crucial in triggering the holiday decision.
 - Prioritise passion points and special interest content based on what motivates the individual GB holidaymaker.
- Develop audience summaries of first-time and repeat visitors, and Culturally Curious and Social Energiser holidaymakers to capture insights, motivations and needs in order to support consistent communications.
- Develop short-break itineraries that inspire and inform potential holidaymakers, providing reassurance that there is lots to see and do.
- Take a strategic approach to GB publicity and promotions in line with the GB Market Review.
- Develop publicity content and media itineraries that mirror the findings of the GB Market Review.
- Develop a plan to encourage advocacy and word of mouth, utilising digital influencers, user generated content and industry generated content.





3. Create hub experiences with compelling reasons to venture beyond Dublin and Belfast.

The majority (65%) of GB holidays to the island of Ireland take the form of a short-break of up to 5 nights. Our research shows that GB holidaymakers seek reinvigoration from a short break that can be delivered by:

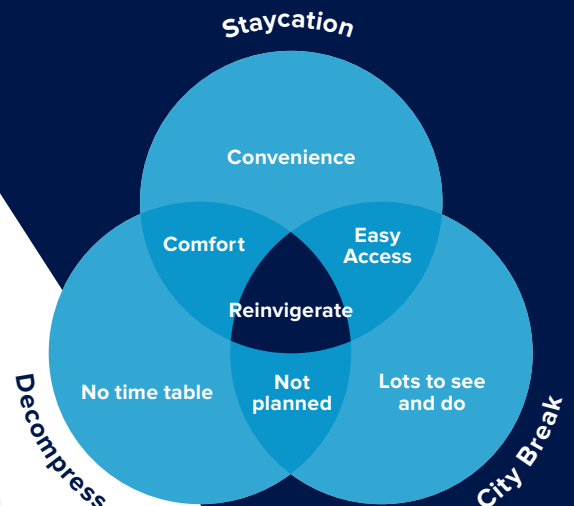
- ➔ Convenience – spontaneous, easy access, predictable and good value.
- ➔ City break – lots to see and do, and good value.
- ➔ Decompressing with no agenda – the location is less important than an indulgent experience. Relaxation is the primary goal.

The island of Ireland delivers well against each of these motivations, but is competing in a very busy marketplace with domestic staycations and European city breaks.

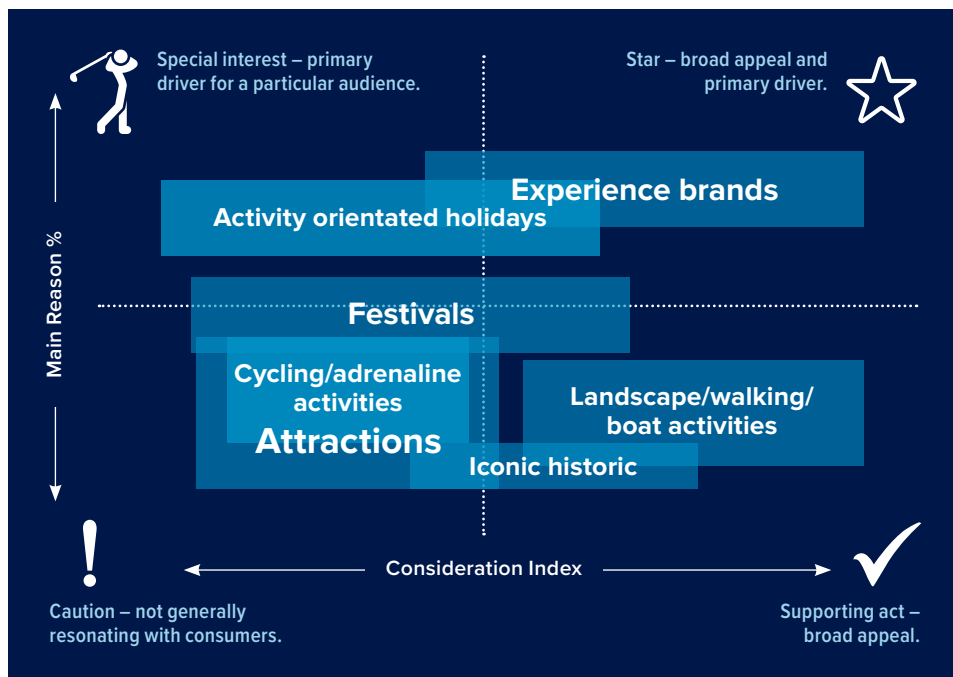
First-time holidaymakers to the island of Ireland are likely to be attracted to well-known destinations such as Dublin and Belfast. The remainder of the island of Ireland can seem a more daunting option for a short break, due to a lack of knowledge of what there is to see and do, and perceived barriers to venturing further afield. To remain competitive, there is a need to offer short breaks across the island of Ireland that are ‘easy – different, but not difficult’.

This can be addressed by creating ‘hub experiences’ within the Experience Brands. A ‘hub’ provides the reassurance that short-break needs will be addressed in an area manageable for a short-break, highlighting ease of access and the reassurance that there is plenty to see and do for a short break any time of year.

SHORT BREAK NEEDS



Fáilte Ireland research shows that Experience Brands can be an important factor in considering a holiday to Ireland – and, for some, activities such as golf are the main reason to travel.



Source: Innovation Screener, Fáilte Ireland (2017)

We will do this by...

Supporting the industry

- Agree criteria for identifying and developing destination hubs that meet GB holidaymakers' needs, including ease of access, compelling reasons to visit for a short break, high quality food and drink and being open year-round.
- Tourism agencies will work with industry to identify and bring to life a select number of hubs across the island of Ireland. The number of hubs will evolve over time.
- Capitalise on existing clusters, as well as developing new ones; and develop GB specific itineraries for the hubs to reassure people there is lots to see and do that will be of interest to them.

Promoting the hubs in Great Britain

- Communicate the hub experiences – highlighting the products and experiences that specifically appeal to GB holidaymakers' needs and motivations.
- Develop 48-hour itineraries to support the promotion of the hubs and provide reassurance that there is plenty to see and do for a longer stay.
- Communicate authentic living culture alongside ease of access, to show an island of Ireland short break is easy – different, but not difficult.
- Target geographical areas in GB with direct access to hubs, including point to point regional promotion, highlighting key regional routes and ease of access.

Identify future hubs

- Gather learnings and identify potential new hubs that will deliver on the necessary criteria.





4. Further develop appropriate access to and within the island of Ireland

While the island of Ireland has excellent air and sea access from GB, it doesn't always facilitate an easy regional short break. Further developing and communicating appropriate access to and within the island of Ireland will encourage GB holidaymakers to choose it as a destination. There is an opportunity to work with the industry, air carriers and airports to create the conditions that will enable economically sustainable regional schedules to appeal to the GB short-break holidaymaker. Sea carriers serve GB holidaymakers well throughout the year, facilitating longer trips and bringing a car.

Access within the island of Ireland by car is very good. However, getting around without one can be perceived as a challenge. Providing more information on transport options breaks down the barriers to venturing beyond our cities. There can also be a perception that it is easier to take a day-trip excursion from a city, rather than to stay in a local or rural area. Enhancing local transport suitable for GB holidaymakers and improving communications of these services will help to unlock these destinations. It is noted that some of the challenges may take longer to address, but the positive impact of resolving them will extend beyond the GB holidaymaker.

We will do this by...

Improving access to the island of Ireland

- Audit regional access options to Ireland and Northern Ireland, including how they align with year-round short-break GB holidaymakers' needs.
- Work with air and sea carriers, airports, and regional product providers to identify opportunities for further demand-led scheduling, aligned to the experience hubs and supporting easy travel by air and sea from across GB.

Improving access within the island of Ireland

- An orientation plan that shows how visitors can get around the island of Ireland will be scoped, and the implementation of the plan will begin.
- Work to achieve full activation and communication of the new Dublin Orientation Plan, which will meet the needs of the GB holidaymaker's movement within Dublin.
- The tourism agencies will develop clear guides to internal access to support holidaymakers and share this with industry.
- Tourism agencies will work with industry and transport partners in hub locations to implement 'final mile' initiatives. Final mile initiatives ensure that holidaymakers can get to their final destination with ease – the challenge for this often comes at the last stage of the journey, i.e. the final mile. Final mile initiatives will enhance the visitor experience of travelling around and within hubs, and will be promoted in the GB Market.
- Continue promotion of self-drive/fly-drive and longer-stay holidays in GB.

What success looks like

The potential of the GB holidaymaker market to the island of Ireland

The ambition of this strategy is to increase holidaymakers and holidaymaker revenue, while supporting regional growth and season extension.

With the whole industry, tourism agencies and stakeholders working together, we can achieve this ambition and capitalise on the huge potential of the GB holidaymaker to the island of Ireland.

The GB holidaymaker market has the potential to grow holidaymaker revenues by:

- **25% for the island of Ireland, to reach €705m/£613m by 2022**
- **33% for Northern Ireland, to reach £116m by 2022**
- **24% for the Republic of Ireland, to reach €572m by 2022**

Achieving the growth potential is based on funding being available to complete all product development and marketing actions, and collaboration between agencies and industry to ensure activities are aligned and deliver on the recommendations of the GB Market Review.

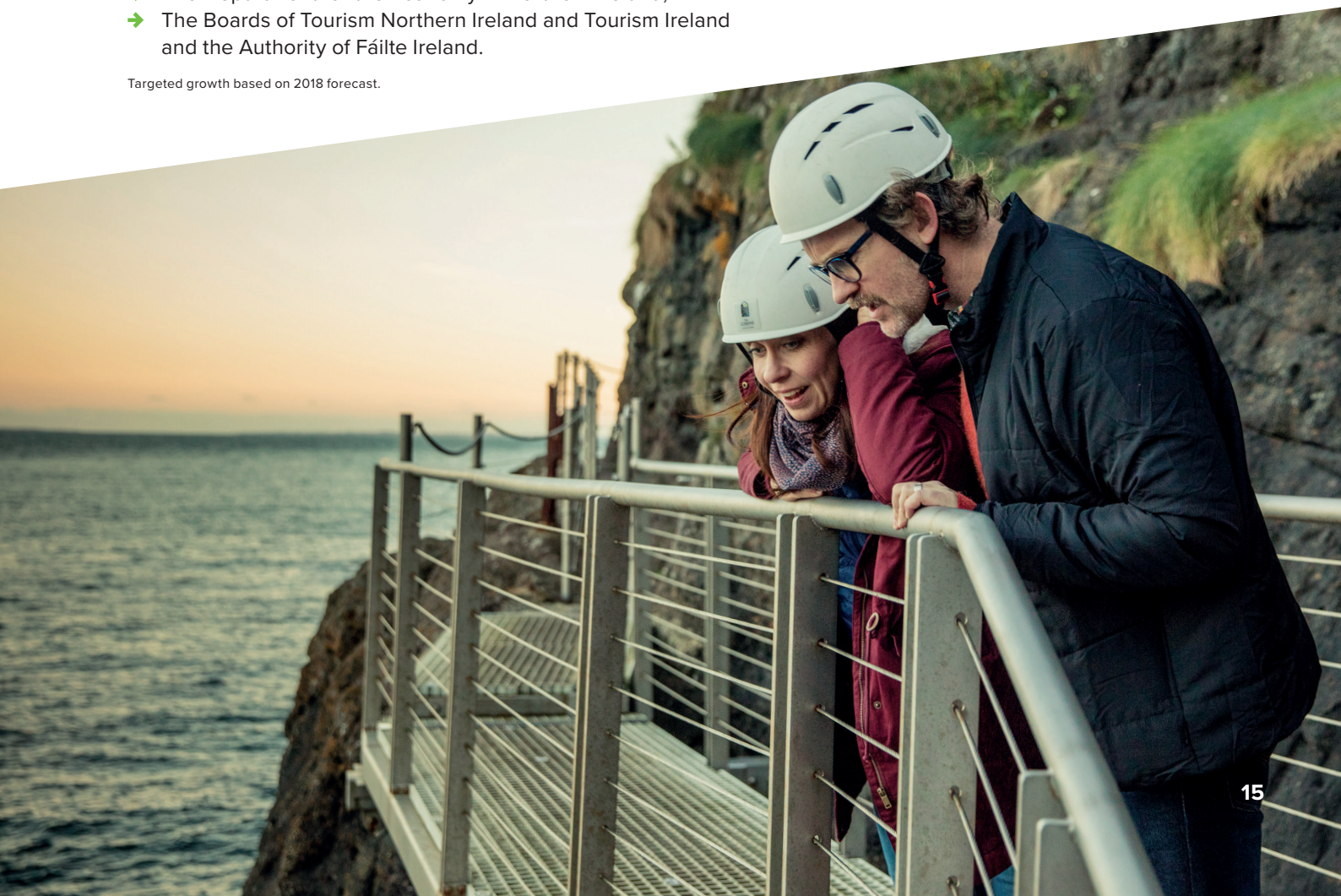
The GB Market Review Implementation Group will collectively own the actions and lead on the delivery of the GB Market Strategy recommendations. The group will meet twice a year, while the GB Market Review Steering Group will meet once a year.

Targets

A set of targets will be prepared and reviewed annually. The Implementation Group will report to the Central Marketing Partnership Group and regular updates will be provided to:

- DTTAS Tourism Leadership Group;
- The Department for the Economy in Northern Ireland;
- The Boards of Tourism Northern Ireland and Tourism Ireland and the Authority of Fáilte Ireland.

Targeted growth based on 2018 forecast.





The GB Market Review Steering Group

The review has been led by the Industry Chair, Stephen McNally, and Vice-Chair, Katy Best, working closely with Tourism Ireland, Fáilte Ireland, Tourism Northern Ireland and a group of industry representatives and thought leaders who comprise the GB Market Review Steering Group. The Steering Group monitored progress and provided invaluable input to the development of the strategy.

Members 2018

Chair

Stephen McNally
Dalata Group

Vice Chair

Katy Best
Belfast City Airport

Steering Group

Naomi Waite
Tourism Northern Ireland

Niall Tracey
Fáilte Ireland

Julie Wakley
Tourism Ireland

Neil Aulton
Tourism Ireland

Nicola Allen
Tourism Ireland

Ali Gayward
easyJet

Anna Marie Delaney
County and City Management Association

Chris Farrow / Patrick Michalski
OMD Media Agency

Dara McMahon
Aer Lingus

Dom Boyd
Publicis

Doreen McKenzie
Northern Ireland Tourism Alliance

Eoghan O'Mara Walsh
ITIC

Gemma McGovern/Paula Brennan
Booking.com

Helena Healy
B&B Ireland

Janice Gault
Northern Ireland Hotel Federation

Janine Cuff
Albatross Group

Joe Dolan
Irish Hotels Federation

Justin Reid
TripAdvisor

Laura McCorry
National Museums of Northern Ireland

Liam Hannaway
Newry Mourne and Down District
Council representing Northern Ireland
Local Government Association

Nick Mottram
Irish Ferries

With thanks to the Steering Group members for their time and support as well as to the many trade, industry and media partners who provided invaluable input to the workshops in Galway, Belfast, Dublin and London. We would also like to thank MCCP for its involvement in the review.