

CULTURALLY CURIOUS



Fáilte Ireland
National Tourism Development Authority

Why segmentation?

In order to attract more of the right type of visitors and grow Ireland's tourism economy, Ireland's tourism agencies have developed an overseas segmentation model spanning the most important source markets: Europe, Great Britain¹ and the USA.

This segmentation model is focused on understanding visitor motivations and needs and then grouping those visitors with similar behaviours and needs together (segmenting) in order to better target visitors through sales and marketing activity and also to develop the right type of visitor experiences to meet their needs.

Seven segments were identified as being most likely to visit Ireland; three of these segments are being prioritised based upon their likelihood to actually visit Ireland, and both the economical and geographical return on investment that they would yield for the tourism industry.

The 3 segments with the strongest potential for Ireland are:

Social Energisers

.....

Culturally Curious

.....

Great Escapers

.....

Most visitors to Ireland, display similar expectations, motivations and desires from their 'Ireland' holiday. They all want to get away from it all, have fun, experience new things, meet locals etc. They all seek a city break and enjoy a touring holiday. They enjoy nature, walking and boat trips, local food and music.

It is the degree to which certain segments **distinctly** behave and purposefully seek out certain experiences over others that makes them **distinctive** and interesting.

Here we focus on the distinctions and nuances surrounding the Culturally Curious. We will look at who they are and what motivates them. What are they looking for from a holiday in Ireland, how they come to book their holiday – their holiday journey, and more importantly what we need to know and do as tourism businesses and destinations in order to grow market share from this segment.



Figure 1

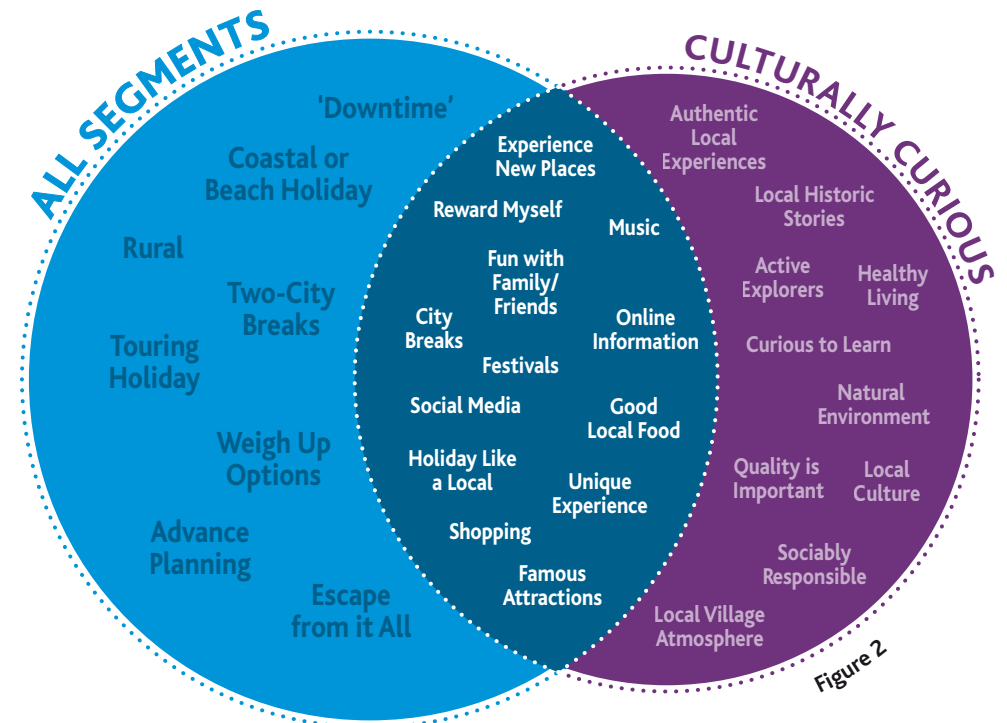


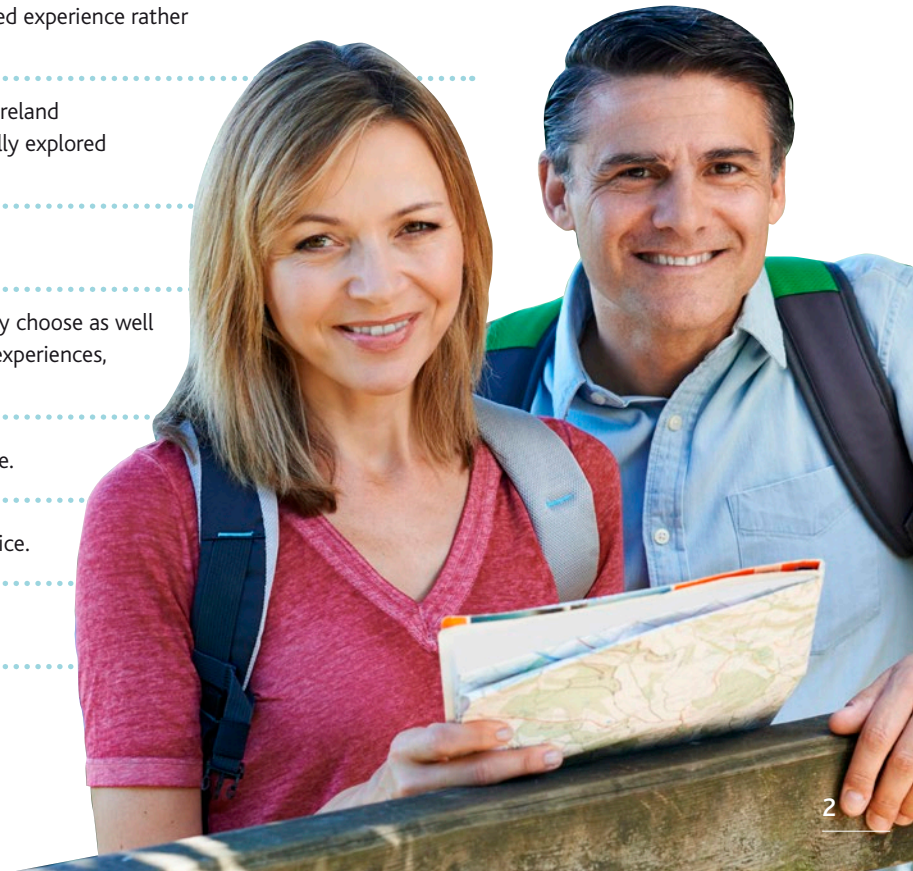
Figure 2

¹ Great Britain excludes Northern Ireland

Culturally Curious highlights

Culturally Curious are

- 1 Curious learners who want to visit new places and expand their travel experience by exploring landscapes, history and culture.
- 2 'Explorers' rather than 'tourists' – they are well travelled and want to discover the hidden stories and get under the skin of a destination.
- 3 They base themselves in a location, using mostly serviced accommodation, hire a car and travel around exploring the wider area during the day.
- 4 Looking for 'out of the ordinary' travel experiences. They want an interactive, local and personalised experience rather than the usual prescribed tour.
- 5 Travellers who want to relax, enjoy and explore the natural environment and experience the real Ireland by being active in scenic landscape (walking, cycling etc.). They want to go home feeling they really explored a place and feeling good about themselves socially, physically, mentally and spiritually.
- 6 Sociably responsible and environmentally conscious.
- 7 Quality conscious – quality is important to them in terms of quality of products and services they choose as well as the quality of life and wellbeing. They will pay extra for quality products such as personalised experiences, fresh local produce, hand crafted and organic products and recognise 'quality badges'.
- 8 Health conscious they look after themselves; going out of their way to eat healthy and stay active.
- 9 People that like to be recognised and acknowledged for having made a good, cultural holiday choice.
- 10 Individuals who like to share their special, personal experiences with others via word of mouth.



Who are they and what motivates them?

Visitors who are connected to issues of society, the environment and self, and who will pay extra for quality

They are independent, explorative, travellers who tend to 'do a destination' in one holiday (e.g. 1-2 weeks), generally basing themselves in one location with good access and facilities from which they will explore the area quite extensively hiring a car and guiding themselves around.

They are motivated by their curiosity and a passion to **broaden their minds** by **exploring new places, and connecting** with the local **people**, their **way of life** and **learning through new experiences**.

Not surprisingly, they are well travelled and are the most selective in terms of types of holidays and activities they choose and are always looking for new places and experiences that are **intimate** and '**out of the ordinary**'.

They seek **rich, diverse and personal experiences** which allows them enhance their repertoire of intriguing life stories to share with family and friends.

That said, they also want to visit historical sites that have an engaging story to tell, be active in nature but not do anything too strenuous. They want spontaneous access to culture particularly those for which a destination is famous and especially if they are presented in an authentic and environmental friendly setting. They are largely professionals, holiday longer and have the highest average income of all the segments. They therefore immerse themselves while on holiday and enjoy what is going on around them.

They spend **just over 7.66 days on average in Ireland** which is almost a day longer than the average holidaymaker. They spend €97.06 per person per day. They take the highest number of recent holidays but important to note they are selective in terms of where they go on holidays and what they do once they get there².

They pre-plan aspects of their trip, and gather most information before their trip, more than the other segments. This may involve online research or offline, through the use of guidebooks.



Culturally Curious
are explorers, who
want to broaden
their minds and have
'out of the ordinary'
experiences



² Fáilte Ireland Survey of Overseas Travellers, 2015

Culturally Curious are active sightseers and want to explore a destination.

Core motivations of all Culturally Curious are similar across all age groups; they want to explore and be immersed in a place connecting with the locals and local customs so that they can discover the hidden gems of a destination. They are frequent travellers looking for something 'out of the ordinary', immersive and enchanting and are selective in terms of where they holiday. Older Culturally Curious visitors are less likely to do strenuous activities but moderate activities such as strolling and cycling appeals to all.



Data sources: Fáilte Ireland Survey of Overseas Travellers, 2015 and Fáilte Ireland Global Segmentation Research, 2015

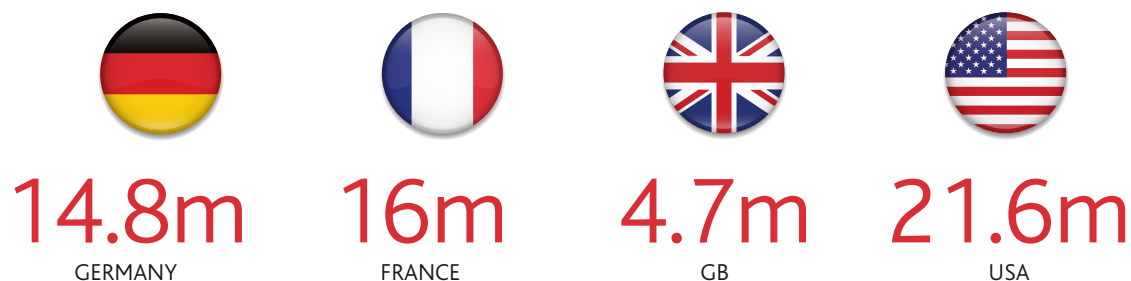
50% of visitors are from mainland Europe

Mainland Europe markets of France and Germany present a sizeable market opportunity of 30.8m Culturally Curious; 25% of all Culturally Curious who visited Ireland in 2015 came from Europe, with Germany being dominant. Being in the Eurozone with ever-improving access, and having a good understanding of Ireland's brand distinction and a greater propensity to travel a few extra days beyond Dublin, positions Germany and France as strong prospects for Ireland's destination experience offering.

The GB market, on the other hand has a smaller Culturally Curious market, in terms of numbers of people, at 4.7m. However, in 2015, 15% of all Culturally Curious visiting Ireland came from GB, which indicates that GB visitors have a greater propensity to visit given their proximity and ease of access. The recent uncertainty in relation to currency and value arising from Brexit, coupled with the need for Ireland's Ancient East and the Wild Atlantic Way to compete with GB in terms of an easier and evolved staycation market, presents significant challenges for the GB market in 2017 and beyond.

Given the overall geographical size of the USA it is therefore of no surprise that the USA is the largest source market for all segments. The importance of the USA market is borne out in past performance where 25% of all Culturally Curious to Ireland in 2015 came from the USA³. Although the USA is set to remain a dominant Culturally Curious source market, it is important to consider external factors that may impact on the American visitor coming to Ireland. Factors such as travel cost, journey time and, in particular, escalating safety issues, may impact on the likelihood and frequency of travel from the USA. Therefore, all markets are important.

Segment size by market, 2016 (millions)



³ Source: Tourism Ireland GTI Survey, 2016

€97.06

Culturally Curious average daily spend

Stay on average 1 night longer
than the average overseas holiday maker



Some barriers to choosing Ireland

There are barriers to choosing Ireland as a destination other than the issues discussed above (i.e. Brexit, safety issues and the evolved staycation market) that visitors may consider before coming here. These barriers can conjure up a negative image of Ireland whilst the visitor is deciding to come here or not. The main barriers that have been cited by visitors are:

➔ There is low awareness of the **basic geography** of Ireland, getting here and travelling around Ireland. Visitors are not sure where the regions are, what the journey time is between regions and/or cities and how long a trip to Ireland and certain regions and/or cities would actually take. There is a lack of distinction between the cities other than Dublin which can have a narrowly defined bad reputation as a party town with high prices.

➔ Thus, from a UK perspective Ireland presents an unknown quantity beyond Dublin.

➔ For the USA and German Culturally Curious visitors who are likely to travel outside of Dublin by car this means more time, more planning and effort and more money spent planning a trip to Ireland.

➔ There are few or no specific details on **unique experiences** offerings (visitor attractions) that stand out as 'world class' or 'must see'. For some visitors, this can indicate there is not that much to do in Ireland once you arrive.

➔ Ireland can often lack a clear cultural distinction which allows it stand out from other destinations with similar cultures (e.g. Scotland).

➔ There is no clear sense of **distinctive, quality cuisine**. Visitors assume we have a weak reputation for quality food even though they know we have good ingredients.



What are they seeking from a holiday in Ireland?

Ireland features highly on their list of places to visit behind destinations such as Italy (Tuscany, Rome, Venice) and parts of the USA (New York, California) and ahead of England and the Scottish Highlands due to their diverse and renowned culturally offering.

City breaks to one or more cities, along with a rural holiday are cited as among the most popular holidays in Ireland for the Culturally Curious. They will base themselves in a town or city and tour around or explore the area by hiking, walking or biking.

Culturally Curious are curious to learn about local **Irish culture, traditions and interesting historical stories**, with a desire to meet the local Irish people, to learn about their lives and hear their stories. They are most likely to visit **built heritage** i.e. castles, ancient sites, stately homes and historic houses but will enjoy getting the **insider perspective** through meeting locals, hearing storytellers relay history in a personal way and watching stories brought to life through re-enactments.

They place high value on the environment and enjoy immersing themselves in the **Irish landscapes and seascapes** through activities such as walking, cycling, boat trips to rugged islands off the West Coast, dolphin watching etc. They like to be active but nothing too strenuous; enjoying the beauty of the natural landscape is the most important thing.

Culturally Curious are explorers and seek to venture **off the beaten track**, avoiding usual tourist spots and opting to sight-see independently and in a more relaxed manner.





They will hire a car and travel distances to experience first-hand the local culture and the 'local ways'. They enjoy visiting **Ireland's small towns and villages**, which provide a more relaxed side to their own holiday and give them the authentic experiences they are looking for. They can be found happily spending an afternoon strolling through a picturesque village, enjoying local food/pubs, exploring the local scenery by foot or bike and experiencing the sights and sounds of Ireland which aren't found in the guidebooks.

They recognise and expect quality and are willing to pay extra for this (e.g. handmade, organic, locally produced goods, crafts and produce). Food is an important part of their holiday experience and although they may not associate Ireland with a strong reputation for cuisine, they do expect **quality, fresh, well prepared local Irish food**.

Dublin

There is 56% interest in Dublin which is not surprising for a capital city offering a wide range of things to see and do, a rich history and long standing capital city culture. However, this interest drops when measured in terms of its ability to provide a strong landscape offering to the Culturally Curious visitor. This presents an opportunity for Dublin to elevate and present the scenic natural resources of its bay, coastal villages, waterways and surrounding mountains. Dublin's UNESCO status is important to this cohort as is highlighting the city's environmental achievements (Dublin Bay Biosphere) and cultural reputation (City of Literature).



WATCH OUT

- Culturally Curious appreciate historical stories but do not want a long history lesson, nor do they want to visit a long list of old, historical buildings and museums. They already have an historical appreciation and most seek the 'untold local nuggets and stories' shared in an engaging and entertaining way. They want to understand Ireland's culture and way of life more so than Irish history which means they want food, music, dance, arts, theatre, storytelling, local pubs and local entertainment.
- Culturally Curious explore extensively during the course of their holiday; hence they are unlikely to to the same area. It is therefore important that these visitors leave Ireland, knowing that there is more to see and other distinctive destination brands to visit. They therefore need to be actively targeted with new compelling reasons to return.
- Culturally Curious from GB feel they have 'similar' and perhaps 'bigger and better' cultural and heritage choices at home. Making it more challenging to persuade them to choose Ireland. The 'Brexit' factor will present even greater challenges for Ireland in the GB market, particularly on value. Ireland's experience brands (Dublin, Ireland's Ancient East and the Wild Atlantic Way) therefore need to focus more on points of distinction, particular in the area of 'living culture' – music, dance, storytelling, local towns and villages and the local experience, which can only be experienced in Ireland.



Ireland's Ancient East

51% of all Culturally Curious indicate a strong interest in Ireland's Ancient East. A destination offering 5000 years of European history, brought to life through storytelling, local people, food, crafts, music and festivals set against a backdrop of lush green landscape that is easily accessible appeals strongly to the Culturally Curious segment – especially the US market. Visitors from France and Germany indicate a strong interest in Ireland's Ancient East, while GB visitors show only moderate interest (consistent with the GB response to Ireland in general).

Culturally Curious refer to an interest in visiting more than one city; which can be presented as a strength for Ireland's Ancient East given the number of small, distinctive cities i.e. Waterford, Kilkenny, Cork, Athlone etc. However, 'cities' can cover a large town where there is a good tourism service base; places to stay, good access and lots to see and do.

For this segment, top things to see and do include unearthing cultural and historical stories in an entertaining and engaging way through locals, guides and visual displays (e.g. re-enactments and actors); wandering through a local picturesque town or villages, 5km walks and cycles, boat trips through inland waterways, local food markets and festivals; pubs and Irish music.

Wild Atlantic Way

60% of all culturally Curious express strong interest in visiting the Wild Atlantic Way. Visitors from France and Germany indicate a high interest while GB respondents indicate a more moderate interest.

The promise of being immersed in an Atlantic culture, stunning landscapes and having the longest coastal touring route is very appealing to the Culturally Curious, highlighting their strong desire to witness local, authentic cultures which they can learn about and enjoy. Although Galway is the only City on the Wild Atlantic Way, Limerick and Cork can function equally as a City base for the Culturally Curious as can large, well serviced towns such as Killarney, Westport and Donegal. Whereas Culturally Curious generally base themselves in one central 'touring' location, it is equally feasible for them to stay in more than one location along the Wild Atlantic Way to allow for longer touring. Top things to see and do include walking along the tallest cliffs in Europe, wandering through a local picturesque town or village, dolphin and whale watching, boat trips to rugged islands off the west coast etc.



What influences their holiday decision?

The holiday ideas and choices of the Culturally Curious are largely influenced by the experiences of other people. Hence the importance of word of mouth via friends and family.

Internet browsing is the second most important channel to target this group; they will search online via Google and other sites. They tend to use the internet for **practical/factual** information to endorse their decision and to assess detail such as availability, ease of access and cost of flights and accommodation. **Consumer reviews** are seen to be the most trustworthy sources. They want to see **images** of the real Ireland – its culture, places and people so that they can visualise themselves in Ireland.

MARKETING TIP

Targeting the Culturally Curious requires a use of language, imagery and tone which creates a strong emotional connection with the place and its people helping them visualise themselves immersed in the sights, sounds, smells and tastes of the local environment. The language also needs to conjure up a series of benefits for the visitor such as a more enriched mind, body and spirit.

Sights

Smells

Sounds

Tastes



The visitor journey

The visitor journey depicts the stages a visitor typically goes through when taking a holiday.

The initial **motivation** can range from simply needing downtime or perhaps a celebration. They consider a number of countries and destinations in their minds and categorise them under 'good for culture'; 'good for scenery' 'good for hiking' etc. Once the need for a holiday is triggered, this consideration list is called upon. Hence the importance of international marketing of Ireland, the Wild Atlantic Way, Ireland's Ancient East and Dublin by Fáilte Ireland and Tourism Ireland. However, destination influences come from a wide mix of sources such as recommendations from people we know, documentaries, magazines, Irish music and the arts etc.

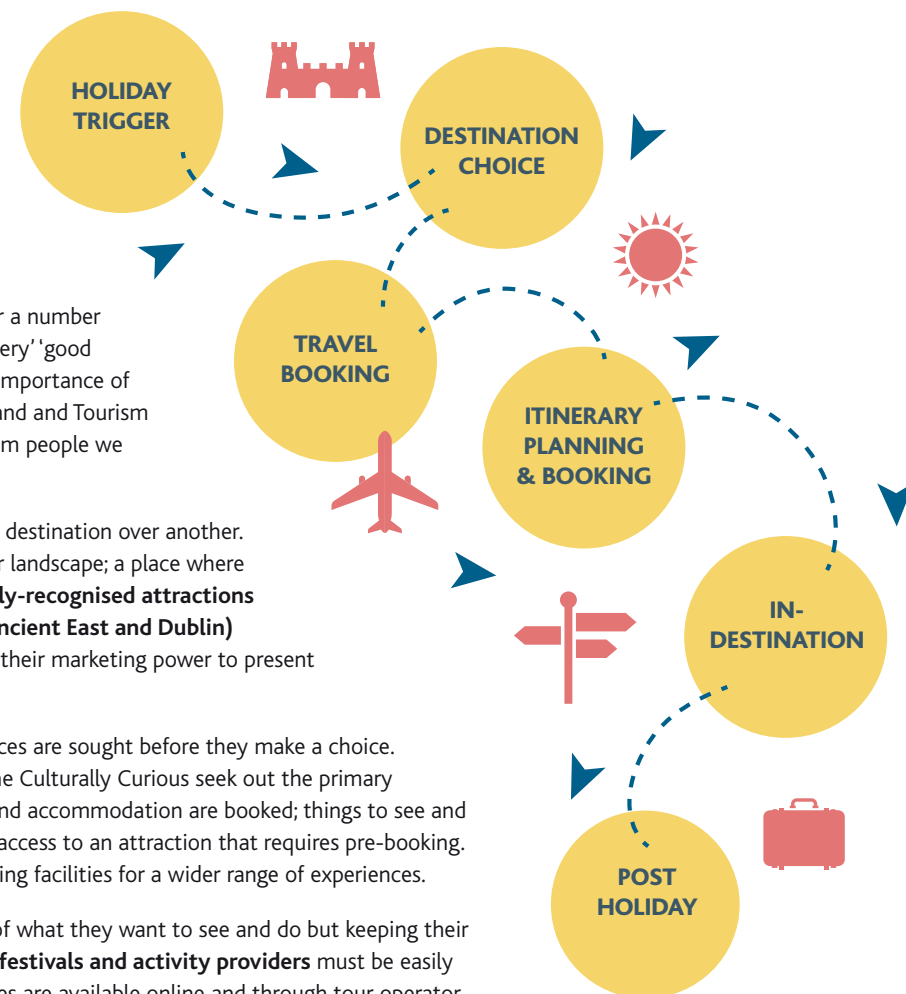
Culturally Curious largely seek inspiration and ideas from people they know in helping them choose one destination over another. They will be particularly interested in destinations with cultural richness, distinction and a reputation for landscape; a place where they can explore, 'go local', experience new things and broaden their minds. Here the **top internationally-recognised attractions ('biggest', 'oldest', 'best') along with distinctive destination brands (Wild Atlantic Way, Ireland's Ancient East and Dublin)** come to the fore. Therefore, it is important that tourism businesses are aligned with the brands and use their marketing power to present their own business experience to an international audience.

The travel booking stage is quite complex; a variety of on and offline sources of information and influences are sought before they make a choice. They must be easily able to conjure up a **mental map** of a place with lots to see and do. At this stage the Culturally Curious seek out the primary practical information that is important to them to do and see. Generally, transport (including car hire) and accommodation are booked; things to see and do are not booked in advance unless central to the holiday, such as concert/festival tickets or to ensure access to an attraction that requires pre-booking. However, this is set to change as more and more online tour operators (OTAs) are starting to push booking facilities for a wider range of experiences.

Itinerary planning is the fun part. Culturally Curious will have a loose itinerary, capturing the highlights of what they want to see and do but keeping their options flexible to allow for spontaneity and authenticity and avoiding the 'tourist' routes. **Attractions, festivals and activity providers** must be easily found online in order to feature on proposed itineraries. It is important that business offers and incentives are available online and through tour operator channels at this stage to ensure businesses feature on initial itineraries.

On arrival, **the destination must work and live up to the promise**. Businesses who work together, cross-sell and proactively work to ensure visitors have lots of choice and receive the very best destination experience will benefit most. Local accommodation providers, tourist offices, restaurants/bars, taxi drivers etc. should be an advocate for your business to ensure you capture business in-destination. Cross referencing and cross selling is particularly important in maximising the opportunity from the Culturally Curious as they are explorative and inquisitive visitors, seeking local advice and local experiences and will travel to unplanned hidden gems. However, if they check online they are more likely to use Tourist Board sites as they prefer to use a trustworthy and official source.

The post-holiday experience is often overlooked and an important opportunity to maintain a connection with the visitor for mutual benefit – their memories and choices are reinforced through word of mouth and your business experience is widely promoted. The Culturally Curious have high expectations and are very likely to write a review if they have had a bad experience but word of mouth would generally be the key communication channel for this segment – particularly when they have had a good experience.



The Culturally Curious journey

HOLIDAY TRIGGER



CULTURALLY CURIOUS INSIGHT

I need downtime ... to do something really different, broaden my mind and enrich my life.

DESTINATION PRIORITY

Increase on and offline publicity particularly focusing on the destination's cultural and environmental profile.

Encourage word of mouth via Trip Advisor and other review sites.

INDUSTRY PRIORITY

During the holiday trigger stage the visitor prioritises where they are travelling to – the destination, rather than the business.





CULTURALLY CURIOUS INSIGHT

Influenced by

Recommendations from colleagues, peers, friends, family

Social media groups, peer groups

Cultural media

Environmental media

Cultural events and festivals (e.g. music, food, arts)

Recognised famous sights/must see attractions and famous historical events

Must feel easy to get to and navigate around. Require mental map of destination for reassurance before booking. Happy to get off the beaten track but need assurance of quality destination infrastructure and services.

DESTINATION PRIORITY

Accentuate the unspoilt landscape – scenic unpopulated images, environmental designations, accolades such as UNESCO.

Show images of outdoor activity within the landscape (walking/hiking etc.).

Present a unique and accessible local culture, through local pubs, music, festivals, crafts etc.

Focus on distinctive and important historical stories and events.

Promote easy-access, ease of touring, friendly locals and quality accommodation.

Supported by a clear mind-map of lots to see and do and how visitors can get there, including transport options, journey time, distance, weather, recommendations and all relevant information.

Highlight quality, fresh local food, sustainably produced, well prepared in local restaurants and bars.

Be active on digital marketing; present a strong image and video bank; curate and re-purpose blog posts and ensure influential peer sites such as Trip Advisor are advocating the right message.

INDUSTRY PRIORITY

Ensure your business is visible on Fáilte Ireland's websites: Visit Dublin, Ireland's Ancient East and the Wild Atlantic Way websites offering compelling, targeted experiences specific for Culturally Curious.

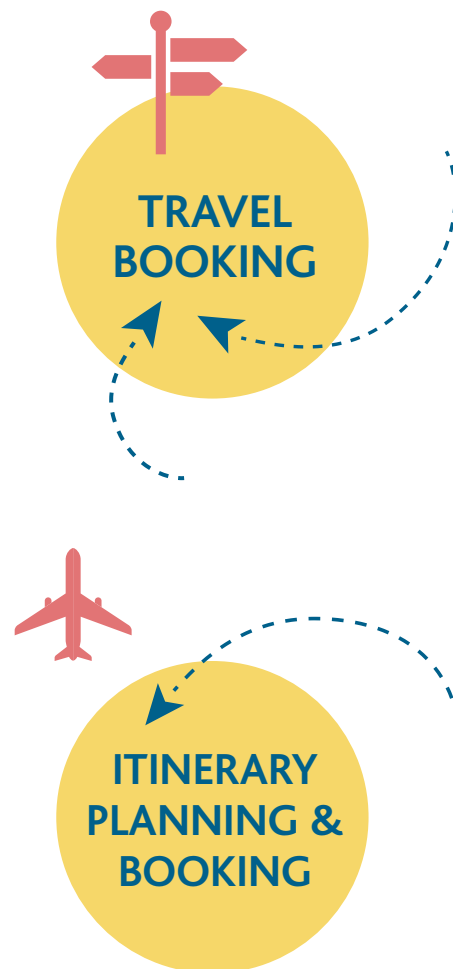
Curate and re-purpose blog posts.

Invest in Web optimisation and paid searches using key phrases.

Ensure positive recommendations on advocacy sites such as Trip Advisor.

Optimise on and offline publicity from any angle possible (cultural media, the arts, environmental, nature and travel media). Watch for topical trending opportunities and link them to your business or location where possible.





CULTURALLY CURIOUS INSIGHT

Book primarily online. May seek reassurance from travel agent but essentials such as transport (flights, ferry) car-hire and accommodation are primarily booked directly through online channels.

DESTINATION PRIORITY

Ensure the destination visibility and top experiences are strong across all on and offline media channels and ensure that everything on offer can be easily and instantly booked online.

Use social media and trending tools to ensure the destination is constantly trending with relevant messaging and experiences for Culturally Curious.

All booking platforms must be mobile enabled.

INDUSTRY PRIORITY

Accommodation and transport providers in particular must be mobile ready and must be present on as many booking sites as possible (including OTAs) with compelling and competitive offers.

CULTURALLY CURIOUS INSIGHT

Plan a full but loose itinerary in advance of arrival to ensure they see as much as possible.

Will leave some space in itinerary to allow for much anticipated "off the beaten track" local experiences.

May book essential attraction tickets in advance if advised for availability.

DESTINATION PRIORITY

Ensure the destination offers and communicates a large array of varied things to see and do, highlighting the top attractions and the most locally distinctive cultural experiences including local entertainment, sport (GAA), Gaelic language and islands.

Stimulate demand with quality personalised, 'limited edition' experiences.

Promote tactical events and offers to drive sporadic bookings.

Ensure activities and attractions can be booked easily and directly on mobile.

INDUSTRY PRIORITY

Be present and visible on all digital platforms – the business must be mobile ready.

Your website must have a user-friendly booking mechanism.

Offer tactical incentives and packages to encourage impulse-buying.

Partner with another business from your area to enhance the overall offering and make it more compelling.

Stand out and be different.

Use, curate and repurpose blog posts.

Invest in Web optimisation and paid searches using key phrases.

Ensure positive recommendations on advocacy sites such as Trip Advisor.

IN- DESTINATION



POST HOLIDAY

CULTURALLY CURIOUS INSIGHT

Stay in a central location (city or town) and explore from there by hiring a car.

Although will visit some famous 'must-see' attractions, generally avoid tourist traps and will opt for more personalised and interactive tours.

Enjoy social activity; preferably where the locals go. Local restaurant, bars, festivals and cultural/sporting events.

Culturally Curious want to feel they are among people who are interested in them; they feel more connected and fulfilled.

Expect good quality accommodation and a high level of customer service.

The local food experience is very important: good quality local food and service excellence.

Will post negative experiences on social media.

CULTURALLY CURIOUS INSIGHT

Openly relay their experience – positive reviews are relayed face-to-face to friends and family.

Will actively encourage others to visit.

Will only return if they believe there is 'another' Ireland which they didn't yet explore.

DESTINATION PRIORITY

Provided good on and offline visitor information.

Daily "what's on" listings are critical, particularly related to the local scene rather than 'tourist information'.

Culturally Curious prioritise recommendations from locals e.g. concierges, publicans, cafe/restaurant staff etc.

DESTINATION PRIORITY

Continue publicity on and offline to reinforce positive memories.

Promote another of Ireland's destination brands, warranting another 'journey of exploration'.

INDUSTRY PRIORITY

Ensure all visitor facing staff are fully informed to be able to advise on where the locals go and the truly authentic 'must-see' experiences.

Be interested and politely personal. Make the visitor feel special and interesting. Staff should refer to them by name wherever possible.

Ask for contact details to develop a data base which can be used for further marketing.

Work with your local tourist information office.

Encourage visitors to share positive reviews.

Surprise them with something free and unexpected to make their experience more personal.

Cross promote with relevant local industry partners to upsell experiences; keeping it local and keeping it real.

Ensure local accommodation providers are fully aware of and advocate your business.

INDUSTRY PRIORITY

Share a social media memory and invite them to return and recommend to family and friends.

Hotel groups or business with a number of properties should proactively target visitors to return to Ireland for a different holiday experience.

Gather user-generated content for your website.

Engage in social media conversations.

Run competitions to promote advocacy i.e. share a photo or a caption about something you did on holiday.

Destinations need to

- Offer an authentic experience that shows the real Ireland and life of the Irish people.



- Highlight 'Big Ticket' items; famous attractions and events with world-wide reputation which reinforce the 'quality' and depth of the destinations. Include accolades which elevate the destination's international status around culture and the environment such as UNESCO status and protected areas designated with special environmental and wildlife qualities.



- Show engagement with the landscape through gentle activities such as walking, cycling, hiking and gentle water-activities including boat trips and don't forget to highlight what's special about the land/seascape in terms of flora and fauna.



- Present 'hidden gem' experiences that are beyond the tourist trail and used by locals, including local cultural, sporting and community events.



- Showcase experiences that tell and demonstrate historical and cultural stories of Ireland. Particularly draw out opportunities to present the story in the form of 'a shared history' between Ireland and the visitor nation helping to create a strong affiliation with Ireland.



- Promote access to Gaeltacht areas to allow visitors experience the native language first hand in a relaxed, community setting.



- Promote the islands off Ireland's West Coast as a very unique and authentic cultural and environmental experience.



- Promote and tell the local stories of regional historical sites.



- Be welcoming and appreciative of visitors as a community, recognising their importance economically and striving to ensure the experience is the best it can be.



- Highlight easy access to and around destinations via car.



- Include estimated times it takes to get from A to B by car, foot and train, public transport links taxi fares etc. in promotional material.



- Offer a range of accommodation options which are located in the centre of key destinations.



- Provide concise activity information, relevant and readily available; referencing what's on locally.



- Make it easy for visitors to find information on where the locals go, highlighting good value for money, locally sourced food and drink, storytelling etc.



Businesses need to

- Align your business offering with an Ireland destination brand ('*Dublin. A Breath of Fresh Air*'; the Wild Atlantic way and/or Ireland's Ancient East).



- Where applicable with a world famous international attraction or activity – tip: use ... the Biggest ... Oldest ... First ... Last ... in Europe or in the World where possible.



- Use impactful images and video content – not only as a means of attracting business, but also while the visitor is with you and after they leave to keep the conversation going. This encourages wider sharing and promotion of your business experiences.



- Think of how you can either present your current business offering or modify your offering to make it stand out more. Attract Culturally Curious attention by being different, a hidden gem full of local history and culture. Build in 'the insider perspective' moment, a hidden treasure full of informative nuggets.



- All businesses need to offer service excellence: making the visitor feel they are important with their needs pre-empted and being addressed by name.



- Offer and promote excellent quality food such as organically grown, locally produced etc.



- Focus on digital sales and marketing platforms and strategies.



- Know how to manage the yield in your business in order to effectively and profitably work a number of channel intermediaries. Online tour operators (OTAs) are an established booking channel particularly for accommodation; but many are adding 'things to see and do' to their booking platforms which present new international sales opportunities for a wider mix of tourism businesses.



- Work as a community – both a 'business community' cross selling offerings and a 'tourism community' ensuring there are local advocates or ambassadors within the community to pass on the inside track to visitors.



- Ensure the local tourist information office is aware of and promoting your business with the correct information.



- Speak specifically to Culturally Curious core motivations by tapping into their curiosity via 'living history and culture' their need to experience out of the ordinary.



SOCIAL ENERGISERS



Fáilte Ireland
National Tourism Development Authority

Why segmentation?

In order to attract more of the right type of visitors and grow Ireland's tourism economy, Ireland's tourism agencies have developed an overseas segmentation model spanning the most important source markets: Europe, Great Britain¹ and the USA.

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It is the degree to which certain segments **distinctly** behave and purposefully seek out certain experiences over others that makes them **distinctive** and interesting.

Here we focus on the distinctions and nuances surrounding the Social Energisers (Figure 2). We look at who they are and what motivates them. What are they looking for from a holiday in Ireland, how they come to book their holiday – their holiday journey, and more importantly what we need to know and do as tourism businesses and destinations in order to grow market share from this segment.



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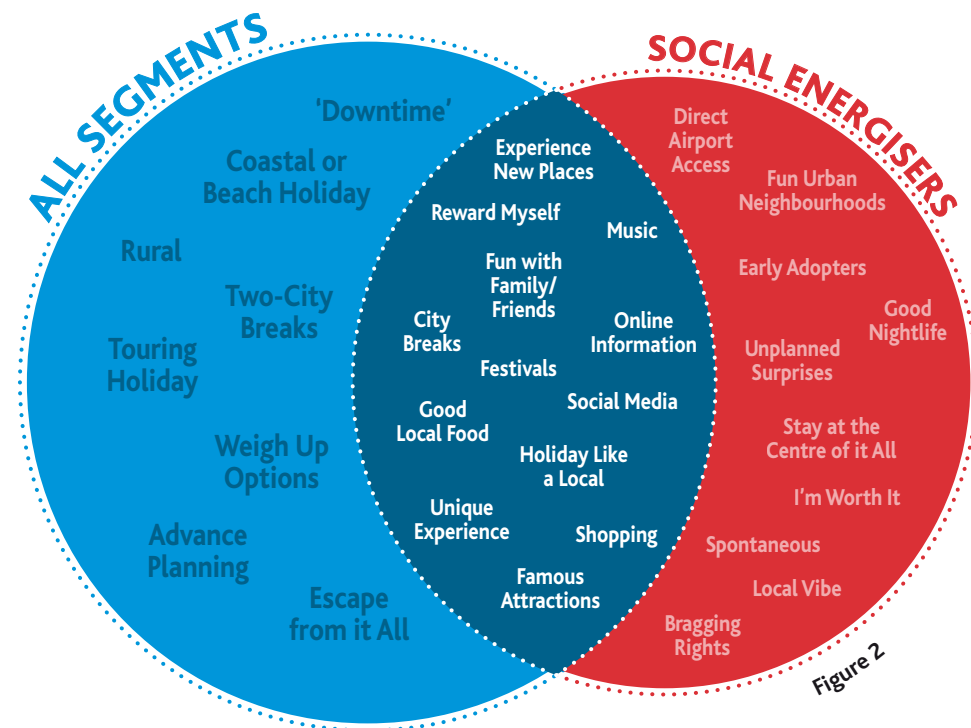


Figure 2

¹ Great Britain excludes Northern Ireland

Social Energisers highlights

Social Energisers are

- 1 Early adopters, trend setters and influenced by brands, reputation and the 'next big thing'... they do not want to miss out.
- 2 Sociable – they are frequent users of digital technology and social media, but also seek out ideas from people they talk to.
- 3 Influenced by the travel stories and experiences of others they meet.
- 4 Conscious of how they portray themselves ... they want their holiday experience to reflect their 'uniqueness' and their aspirations to stand out from the crowd.
- 5 Travellers rather than tourists; they travel a lot, experience a lot and do a lot, hence expect easy access, good facilities, relevant, local and readily-available information and a fun, genuine local entertainment scene.
- 6 Most likely to seek out different local foods and post food images.
- 7 Strong consumers. They are spontaneous and indulgent and believe they should enjoy themselves. They live for today.
- 8 Not typically repeat visitors but have a high potential to visit a city other than a capital. They have a strong influence on like-minded, potential visitors via word of mouth and social media.



Who are they and what motivates them?

They are visitors with a passion, to experience **new things**, constantly seeking out new places and new travel experiences – the more **unique** and exciting, the better.

They are **early adopters**, driven by being the first to try something new, different and innovative. Hence it is no surprise that they are highly influenced by big consumer brands, trends and reputation and of course technology and social media. It is also no surprise that they are **frequent travellers**, and are particularly attracted to cities where they can be guaranteed a local scene and an energetic vibe. They are seeking **fun and excitement** and want to engage fully with the destination, staying at the heart of the local scene. Although they are frequent visitors to urban destinations where there is both **density and diversity of experiences** on offer, they try to avoid 'city tourist traps' and seek out **areas frequented by the locals** and quirky, spontaneous '**unplanned**' experiences. They also perceive these areas as offering better value for money as they are frequented by locals.

That said, they also want to visit the top attractions and activities, particularly those for which a destination is famous and particularly if they are presented in an energetic, engaging and unusual way. They are largely professionals with busy lives and disposable income with which to maintain their lifestyles. They therefore live for the moment, **indulge themselves** and enjoy what is going on around them. They are a lucrative segment, on average **spending 27% more per day than other holiday makers** to Ireland at €130.43 per person per day. However they spend **just over 5 days on average** in Ireland which is 1.5 days less than the average holidaymaker. They also take an above average number of holidays compared to the other segments.¹ They do pre-plan aspects of their trip, but keep their schedule flexible to allow for the unplanned and **unexpected** enviable experiences to happen. This gives them an opportunity to share and brag via **social media**.



Social Energisers are **early adopters**, driven by being the first to try something new, different and innovative



¹ Fáilte Ireland Survey of Overseas Travellers, 2015

Social Energisers are socially energetic; they are young at heart and **they span all age groups.**

Core motivations of all Social Energisers are similar across all age groups; they are frequent travellers looking for something different, exciting and fun and seek out the energy or vibe of a place. However, life stage will bring some nuances. For example, millennials (aged 18-34) are more frequent users of mobile technology, most likely to share their experiences instantly via social media and are bigger consumers of festival and urban nightlife. Older Social Energisers who have travelled more, are likely to choose cities other than the capital and actively seek out value. They will be more travel-savvy and self-sufficient; and may be seen enjoying the social vibe of a local pub.

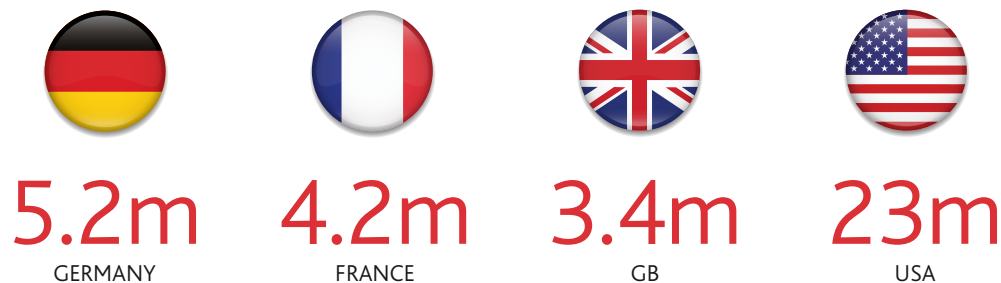


39% of visitors are from mainland Europe

Mainland European markets of France and Germany present a sizeable market opportunity of 9.4m Social Energisers; 13% of all Social Energisers who visited Ireland in 2015 came from Europe, with Germany being dominant. Being in the Eurozone with ever-improving access, and having a good understanding of Ireland's brand distinction and a greater propensity to travel a few extra days beyond Dublin, positions Germany and France as strong prospects for Ireland's city experience offering. The GB market, on the other hand has a smaller Social Energiser market, in terms of numbers of people, at 3.4m. However, in 2015, 23% of all Social Energisers visiting Ireland came from GB, which indicates that GB visitors have a greater propensity to visit given their proximity and ease of access to Dublin and other Irish cities. The recent uncertainty in relation to currency and value arising from Brexit, coupled with the need for Dublin and Ireland's city experience to be significantly different to those in GB, presents significant challenges for the GB market in 2017 and beyond.

Given the overall geographical size of the USA it is therefore of no surprise that the USA is the largest source market for all segments. The importance of the USA market is borne out in past performance where 28% of all Social Energisers to Ireland in 2015 came from the USA². The USA is set to remain a dominant Social Energiser source market, it is important to consider external factors that may impact on the American visitor coming to Ireland such as travel cost, journey time and, in particular, escalating safety issues, which may impact the likelihood and frequency of travel from the USA, therefore, all markets are important.

Segment size by market, 2016 (millions)



² Source: Tourism Ireland GTI Survey, 2016

€130.43

Social Energiser average daily spend

27% higher

than the average overseas holiday maker



What are they seeking from a holiday in Ireland?

Social Energisers, at one level, enjoy similar things to other visitor segments including culture, history, friendly local people, bars and restaurants.

However, there are a few significant differences which really define the core needs of this segment; they are particularly interested in **socialising** and are generally not as interested in galleries and museums, unless they are internationally renowned and a 'must-see'. Social Energisers are looking for destinations with a strong **energetic** vibe, good **nightlife**, a good **local entertainment** scene and **festivals**. They will partake in some activities such as hiking or water-activities but will look forward to the social interaction afterwards, perhaps in the local pub or restaurant where **local food and drink** is important because it is sociable, indulgent and fun.

They do not want to waste time travelling distances. They want to be **located centrally** in the heart of a city or an easy 20 minute walk or train/tram ride from the city centre. If they venture outside of the city, they will expect good, easy transport services (preferably train) rather than car-hire. They want to experience real **living culture** with real locals in an energetic **urban atmosphere**. Because they generally visit 'happening places' they are hoping to 'stumble across' **surprises and unplanned local experiences** which feeds their sense of spontaneity, novelty and indulgence and of course, gives them much valued bragging rights.

'Energy' for Social Energisers is not so much about 'energetic adventure activities' but more about **active places, places with a vibe** and a buzz which they can soak up. They will partake in activities located close to a city, providing there is a good reason such as a famous view from the highest cliff; a 'must-see' or 'must-do' activity. They are **attracted to cities** and destinations which have a distinctive urban reputation or energetic vibe – particularly if the city has a 'hip urban neighbourhood', local residential vibe such as Dublin, London, New York, Berlin or LA. Capital cities, 'distinctive' cities and 'Big Brand' cities such as New York and LA are top of their list.



Dublin and Ireland's cities

Dublin, as the capital city, is the 'entry point' for most Social Energisers. Presenting a vibrant, energetic, varied, accessible and value-packed Dublin is essential in attracting Social Energisers to Ireland – it is the measure of the country's appeal. A positive visitor experience in Dublin will encourage further Social Energisers to visit and also return visits to other cities. Whereas all Social Energisers from all key markets will visit Dublin, those from GB are most likely to focus on purely urban experiences; they will visit Dublin and may visit a second city with direct access.

- ➔ Dublin cannot compete with cities such as New York or London on globally recognised experiences. Therefore, it needs to compete on brand personality and provide an offering that is considered 'in demand'. Dublin needs to offer not only an energetic and contemporary culture but also a strong sense of intimacy, local community and fun which is very different to the bigger international cities in order to connect with this group.
- ➔ Dublin needs to really promote its brand proposition '*Dublin. A Breath of Fresh Air*' which promises something new and different.
- ➔ Social Energisers expect even better value and a different 'city flavour' from non-capital cities. However they still expect the same level of access and facilities along with plenty of unique and surprising experiences.

Wild Atlantic Way and Ireland's Ancient East

Social Energisers from the USA and mainland Europe (Germany and France) are most likely to venture outside of the city and are more open to staying longer (1-3 days) which means they are most likely to take in some aspect of the Wild Atlantic Way or Ireland's Ancient East.

- ➔ Therefore, Social Energisers from Germany and France are most likely to leave Dublin and experience highlights of the Wild Atlantic Way or Ireland's Ancient East for two days, before returning to Dublin.
- ➔ Whereas Social Energisers from the USA are most likely to leave Dublin for a shorter time (a day trip or an overnight stay) to visit a 'must see' attraction(s) and then return to Dublin.

In all cases, transport must be easy as Social Energisers generally avoid car hire, opting for trains or scheduled tours.



WATCH OUT

- Social Energisers from GB need a bigger, more compelling reason to visit Ireland as they feel they have 'similar' choices at home. They are most likely to book short city breaks, visiting Dublin first and then, once positive, return to see another city or cities. The Dublin offering needs to stand out with a strong personality and compelling, unparalleled experiences. The 'Brexit' factor will present even greater challenges for Dublin in the GB market, particularly on value. It is also important to remember that Social Energisers tend to have shorter lead times before they take their breaks. Flights and hotel rates change constantly and are often too cost prohibitive at time of booking, resulting in choosing an alternative, more competitive destination.
- Social Energisers travel to a lot of cities, have high expectations and can easily compare value. Hence they expect to pay 'local prices' in local areas. They also expect to meet real local people and integrate into the local scene. If a 'local bar' or area becomes 'too-touristy' and doesn't seem real, they will not return.



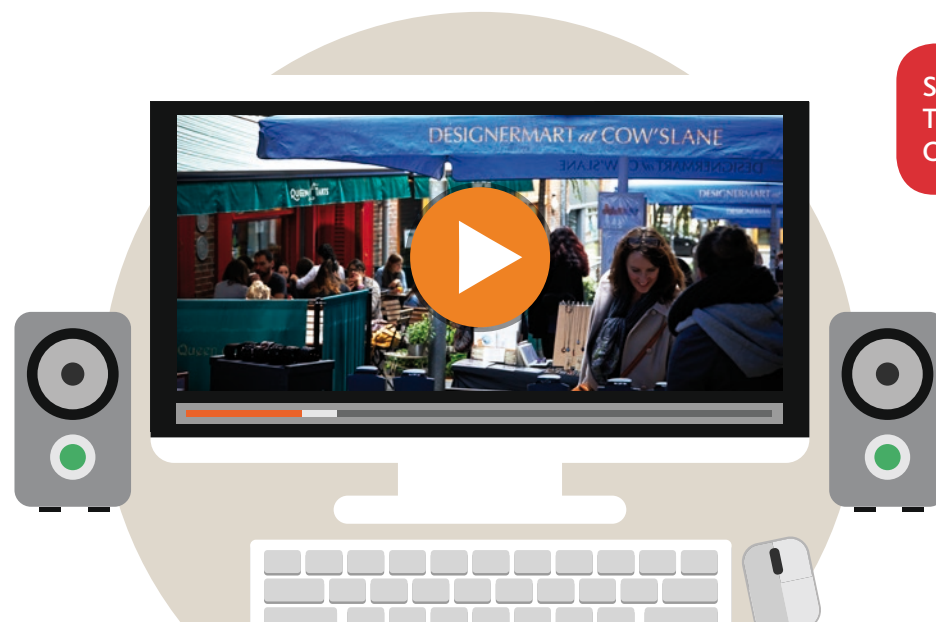
What influences their holiday decision?

Social Energisers are hugely influenced by brands, lifestyle trends and reputation; all of which helps them portray themselves as confident, progressive, trend-setters who enjoy travel and consume experiences.

It is therefore no surprise that Social Energisers are the most **digitally savvy** of all the segments, but they are also significantly **influenced by talking to others** about their holiday experiences. Word of mouth is therefore the most important influencer – including (but not primarily) what is posted on social media.

They will use general **internet browsing** to explore their holiday ideas and will **search for information** about interesting activity options while on **holiday**. Social Energisers are influenced by 'busy', 'full-on' destinations offering lots of variety, good facilities and easy access, they do not go on holiday to 'slow down'. **Images and videos** of authentic, 'once in a lifetime' experiences, framed in an interesting backdrop are really important to influence their decision.

Once the destination is deemed interesting, offers from **airlines** and **Online Tour Operators (OTAs)** are important in influencing the purchasing decision.



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THE MOST DIGITALLY SAVVY
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The visitor journey

The visitor journey depicts the stages a visitor typically goes through when taking a holiday.

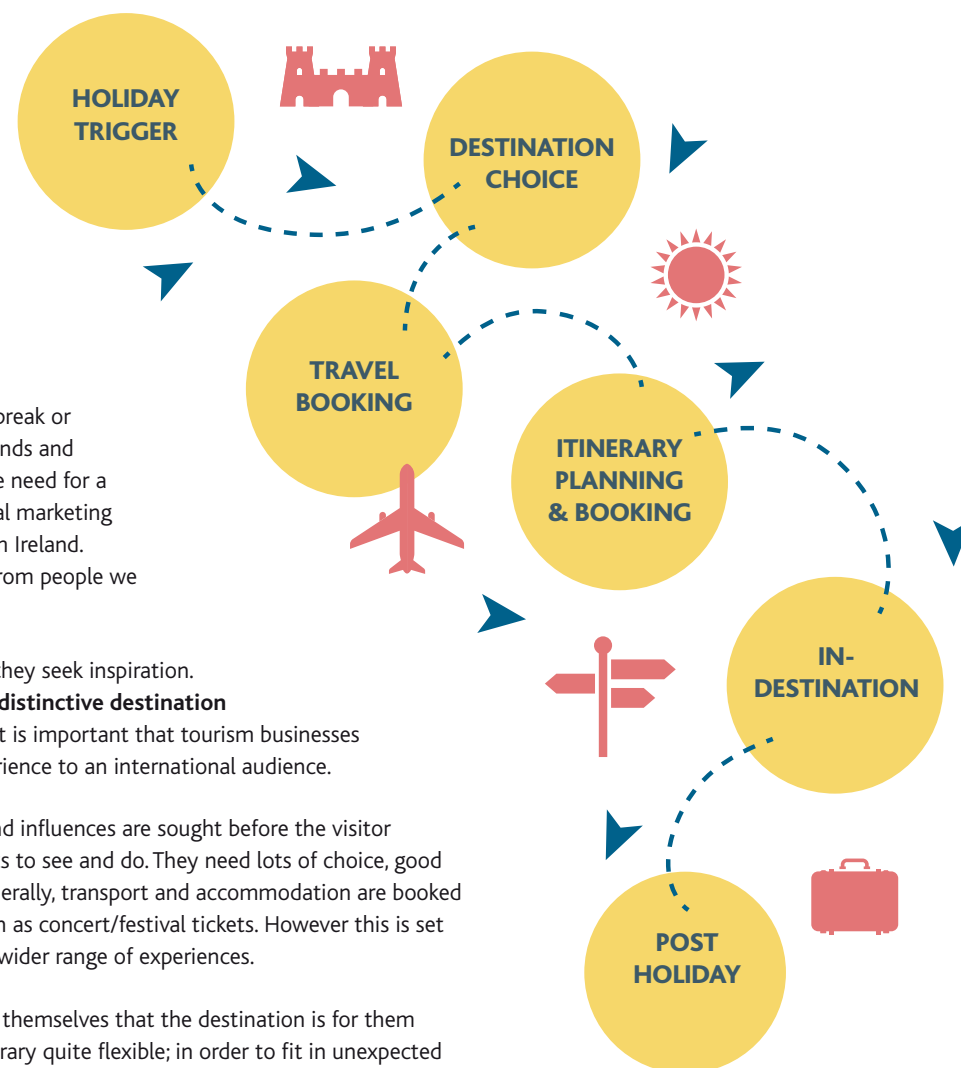
The initial **motivation** can range from a need to get away from it all and relax or a short city-break or perhaps an event or celebration. We consider a number of countries and destinations in our minds and categorise them under 'good for culture'; 'good for families' 'good for a city-break' etc; once the need for a holiday is triggered, this consideration list is called upon. Hence the importance of international marketing of Ireland, Dublin, the Wild Atlantic Way and Ireland's Ancient East by Fáilte Ireland and Tourism Ireland. However, destination influences come from a wide mix of sources such as recommendations from people we know, sporting events, Irish music, etc.

As the prospective visitor moves towards the stage of choosing one destination over another, they seek inspiration. Here the **top internationally-recognised attractions ('biggest', 'oldest', 'best')** along with **distinctive destination brands (Dublin, Wild Atlantic Way and Ireland's Ancient East)** come to the fore. Therefore, it is important that tourism businesses are aligned with the brands and use their marketing power to present their own business experience to an international audience.

The travel booking stage is quite complex; a variety of on and offline sources of information and influences are sought before the visitor makes a choice. The visitor must be easily able to conjure up a **mental map** of a place with lots to see and do. They need lots of choice, good offers, practical information, convenience, flexibility and availability of what there is to do. Generally, transport and accommodation are booked at this stage; things to see and do are not booked in advance unless central to the holiday, such as concert/festival tickets. However this is set to change as more and more online tour operators are starting to push booking facilities for a wider range of experiences.

Essentials out of the way, the fun of itinerary planning starts. Visitors will have already assured themselves that the destination is for them and offers lots of things to see and do to keep them busy. Social Energisers will keep their itinerary quite flexible; in order to fit in unexpected surprises. **Attractions, festivals and activity providers** must be easily found online in order to feature on proposed itineraries. It is important that business offers and incentives are available online and through tour operator channels at this stage to ensure businesses feature on initial itineraries.

On arrival, **the destination must work and live up to the promise**. Businesses who work together, cross-sell and proactively work to ensure visitors have lots of choice and receive the very best destination experience will benefit most. Local accommodation providers, tourist offices, restaurants/bars, taxi drivers etc. should be an advocate for your business to ensure you capture business in-destination. The post-holiday experience is often overlooked and an important opportunity to maintain a connection with the visitor for mutual benefit – their memories and choices are reinforced through word of mouth and your business experience is widely promoted.



The Social Energiser journey

The Social Energiser journey shown below depicts how the Social Energiser thinks, feels and behaves at various stages of booking and going on holiday. It also shows key actions and priorities that both destination's and businesses need to consider to target this segment.



SOCIAL ENERGISER INSIGHT

"I deserve a break ... get away for some fun with friends/family, treat myself ... see and do something really different."

DESTINATION PRIORITY

Dublin, in particular, as the capital city needs to have a strong, exciting and clear international brand proposition to motivate prospective visitors to actively consider Ireland.

Increase on and offline destination publicity.

Develop positive destination word of mouth and advocacy via social media and platforms such as Trip Advisor.

BUSINESS PRIORITY

During the holiday trigger stage the visitor prioritises where they are travelling to – the destination, rather than the business.





SOCIAL ENERGISER INSIGHT

Influenced by recommendations of colleagues, friends and family.

Social media groups, peer groups.

Lifestyle media e.g. fashion, music, etc.

Cool famous people and influencers associated with the destination.

Events and festivals (eg music).

Recognised famous sights/attractions including stand out novel or 'quirky' attractions (kudos).

Must feel easy to get to and navigate around. Direct air access – minimal journey time. Require mental map of destination for reassurance before booking. Must promise lots to do 'for a person like me'.

A compelling two city holiday also appeals to Social Energisers, providing both cities are distinctive, different and very easy and affordable to get to/from by air/rail.

DESTINATION PRIORITY

Communicate the energy behind the city or place brand especially '*Dublin. A Breath of Fresh Air*'.

Highlight top attractions; what's first, biggest etc. highlights the cool, quirky, fun and hip local entertainment scene.

Active digital marketing; present a strong image and video bank; curate and repurpose blog posts and ensure influential peer sites such as Trip Advisor are advocating the right message.

Present other second tier cities as different, a quirky alternative to the capital city drawing out food and music.

Promote easy-access flight packages in to one city, departing from another.

Promote rail connectivity and ease of quality public transportation between cities: car hire is not their preferred option.

Include an extended overnight stay to experience the Wild Atlantic Way or in Ireland's Ancient East to visitors from the USA and EU.

In all cases highlight the 'world famous' attraction or activity first e.g. visit tombs older than the pyramids, in Ireland's Ancient East.

Supported by a clear mind-map of lots to see and do and how visitors can get there, including transport options, journey time, distance, weather, recommendations and all relevant information.

BUSINESS PRIORITY

Ensure your business is visible on Fáilte Ireland's websites: Visit Dublin, Ireland's Ancient East and the Wild Atlantic Way websites offering compelling, targeted experiences specific for Social Energisers.

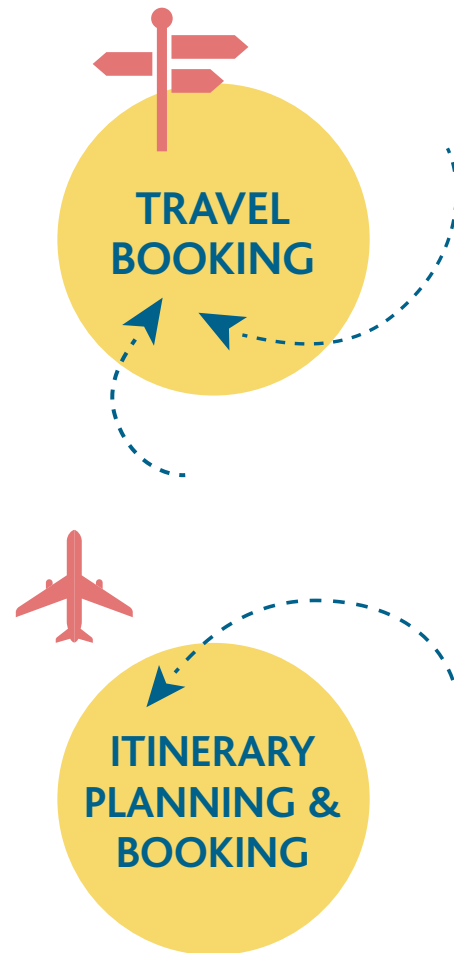
Curate and repurpose blog posts.

Invest in Web optimisation and paid searches using key phrases.

Ensure positive recommendations on advocacy sites such as Trip Advisor.

Optimise publicity from any angle possible (celebs, movie locations, etc.). Watch for topical trending opportunities and link them to your business or location where possible.





SOCIAL ENERGISER INSIGHT

Book primarily online. May seek reassurance from travel agent but essentials such as transport and accommodation are primarily booked directly through online channels.

DESTINATION PRIORITY

Ensure the destination visibility and top experiences are strong across all online media and ensure that everything on offer can be easily and instantly booked online.

To encourage bookings leverage famous people, brands and relevant lifestyle associations. Strong use of images, video and publicity.

Use social media and trending tools to ensure the destination is 'constantly on'.

All booking platforms must be mobile enabled.

BUSINESS PRIORITY

Accommodation and transport providers in particular must be mobile ready and must be present on as many booking sites as possible (including OTAs) with compelling and competitive offers.

Flights and accommodation must be competitive. Social Energisers travel frequently; they have lots of city-destination choice and expect value even with short lead times. This is especially true for GB Social Energisers.

SOCIAL ENERGISER INSIGHT

Plan a full but loose itinerary in advance of arrival as assurance of not getting bored.

Booking of things to see and do mainly on arrival unless advance booking required (e.g. concert or festival tickets).

May contact accommodation directly in advance for assurance and local advice. Leave some space in itinerary to allow for much anticipated "unexpected" surprises.

DESTINATION PRIORITY

Ensure the destination presents a large array of varied things to see and do, highlighting the top attractions and the most quirky and novel experiences, including celeb experiences.

Stimulate demand with 'once in a lifetime', 'limited edition' experiences.

Offer seasonal/tactical events and offers to drive sporadic bookings.

Ensure activities and attractions can be booked easily and directly via mobile.

BUSINESS PRIORITY

Be present and visible on all digital platforms – the business must be mobile ready.

Your website must have a booking mechanism.

Offer tactical incentives, packages to encourage impulse-buying.

Partner with another business from your area to enhance the overall offering and make it more compelling.

Stand out and be different.

Use, curate and repurpose blog posts.

Invest in Web optimisation and paid searches using key phrases.

Ensure positive recommendations on advocacy sites such as Trip Advisor.

IN- DESTINATION



SOCIAL ENERGISER INSIGHT

Stay in the heart of the action and seek out local scene; will seek out advice from locals.

Although will visit most famous 'must-see' attractions, generally avoid tourist areas in favour of 'fun, local hoods!'

Seek out day & night social activity from café's, restaurants and bars to festivals and clubs.

The local Food Experience is very important as both a social event and 'something different' to talk about!

Will post/share lots of images of everything on social media.

DESTINATION PRIORITY

Both physical and online visitor information is vital. This group want 'real time' relevant information and do not want to waste time finding their way.

Daily "what's on" listings are critical, particularly related to the local scene rather than 'tourist information'. This group want local visitor information brought to them, at their accommodation, through free mobile apps highlighting locals' experiences.

Offer value and incentives. Social Energisers will treat themselves and are generally spontaneous and indulgent consumers.

BUSINESS PRIORITY

Ensure visitor facing staff in hotels, bars and restaurants are fully informed to be able to advise Social Energisers on the local scene, the 'happening' places and what not to miss.

Staff should be social media savvy.

Ask for contact details and develop a data base which can be used for further marketing.

Don't forget to talk with visitors, gain and log valuable market insight.

Encourage visitors to take and share photos, provide backdrops with quirky props and offer to take pictures for them.

Surprise them with something free, add to the sense of 'only me, only here!'.

Openly ask them to share their experience positively.

Cross promote with relevant local industry partners to upsell experiences; keeping it local and keeping it real. Provide special incentives.

Ensure local accommodation providers are fully aware of and advocate your business.

POST HOLIDAY



SOCIAL ENERGISER INSIGHT

Openly relay their experience to all, both face-to-face and on social media. Seek out bragging opportunities ... the quirkier the better, reinforcing their own self-image.

Will actively encourage others to visit.

May return to second city if first trip exceeds expectations.

DESTINATION PRIORITY

Continue publicity on and offline to reinforce positive memories.

Affirm their excellent choice of holiday and encourage wider storytelling.

BUSINESS PRIORITY

Share a social media memory and ask them to return with more friends!

Gather user-generated content for your website.

Run competitions to promote advocacy i.e. share a photo or a caption about something you did on holiday.

Destinations need to

- Connect and portray a strong, impactful energetic sense of place.



- Social Energisers will not choose a destination if there is a risk of being bored; they need to feel familiar with the place and reassured by the extent and variety of things to see and do from the early stages of planning all the way through to departure. This includes clear details on journey times, distances, routes, transport, language etc. by foot, rail, bus, taxi etc.



- Highlight the Big Ticket items in an exciting way the top 10 things to see and do with an interesting angle. Talk up anything that has a 'world class' element such as 'biggest', 'oldest', 'first' etc. and the quirkier the better.



- Highlight easy access to and around the area ... airport needs to be within easy reach of their destination by taxi/public transport (20-30 mins).



- Highlight 'what's new', 'what's up and coming' in the destination; Social Energiser have a fear of missing out.



- Include a sense of indulgence ... this grouping definitely feel 'they are worth it' (food, shopping, spas with a difference).



- Actively leverage any international 'reputation builders' which can give the destination 'kudos', particularly those relating to lifestyle categories such as fashion, music, entertainment, sport and technology. Social Energisers have a stereotypical image of Ireland which is not necessarily the most exciting impression ... celebrity and lifestyle references are important in reinforcing a more contemporary, exciting image of Ireland's urban scene.



- Present a strong local food and drink offering – good local ingredients and customs, served to high standards in sociable, quirky and vibrant cafés, bars and restaurants.



- Make it easy for visitors to find information on the 'hip/fun neighbourhoods' where the locals go, highlighting good value for money.



- Have a range of accommodation options in the middle of where the action is.



- Provide concise entertainment/activity information, relevant and readily available; referencing what's on today/tonight/tomorrow. Efficient destinations do the work, enabling Social Energisers to free up valuable time to do the things that are important to them.



- Actively encourage visitors to take photos and share their experiences on social media. Provide good free WiFi access and lots of photo-opportunity prompts which encourage social media conversation! Non capital cities need to offer and highlight unique experiences, better value for money and direct flights.



Businesses need to

- Focus on digital sales and marketing platforms and strategies.



- Prioritise mobile technology as Social Energisers are more likely to post, search and book via mobile.



- Know how to manage the yield in your business in order to effectively and profitably work a number of channel intermediaries. Online tour operators (OTAs) are an established booking channel particularly for accommodation; but many are adding 'things to see and do' to their booking platforms which present new international sales opportunities for a wider mix of tourism businesses.



- Use impactful images and video content – not only as a means of attracting business, but also while the visitor is with you and after they leave. This keeps the conversation going, keeps the memory going and encourages wider sharing and promotion of your business experience.



- Align your business offering with an Ireland destination brand ('Dublin. A Breath of Fresh Air'; the Wild Atlantic Way and/or Ireland's Ancient East). Where applicable with a world famous international attraction or activity – tip: use ... the Biggest ... Oldest ... First ... Last ... in Europe or in the world where possible.



- Think of how you can either present your current business offering or modify your offering to stand out more. Attract Social Energisers attention by being different, funky, quirky and of course 'real'. Build in a 'wow' moment, a surprise. Don't forget to encourage the social media 'memory-making' opportunity which opens up a conversation after they leave.



- Work as a business community – cross selling offerings.



- Speak specifically to Social Energisers core motivations by tapping into their need for 'social approval' ... their need to 'stand out' and be seen as interesting through their holiday experiences. Examples of words/phrases to use:

- Once in a lifetime experience ... must see ... don't miss
- The biggest ... oldest ... first ... last
- Never seen before ... Be the first to ... new and novel ... quirky ... surprising
- Impress your family and friends ... Share with others ... enjoy with others
- Treat yourself ... indulge your senses ... deserving ...
- The real scene ... authentic ... genuine
- Local twist ... where the locals go ... fun urban villages
- Soak up the local atmosphere ... vibe ... fun
- Meet and have spontaneous encounters with the locals
- Explore ... by day ... by night
- Prepare yourself for the unexpected!



GREAT ESCAPERS



Fáilte Ireland
National Tourism Development Authority

Why segmentation?

In order to attract more of the right type of visitors and grow Ireland's tourism economy, Ireland's tourism agencies have developed an overseas segmentation model spanning the most important source markets: Europe, Great Britain¹ and the USA.

This segmentation model is focused on understanding visitor motivations and needs and then grouping those visitors with similar behaviours and needs together (segmenting) in order to better target visitors through sales and marketing activity and also to develop the right type of visitor experiences to meet their needs.

Seven segments were identified as being most likely to visit Ireland; three of these segments are being prioritised based upon their likelihood to actually visit Ireland, and both the economical and geographical return on investment that they would yield for the tourism industry.

The 3 segments with the strongest potential for Ireland are:

Social Energisers
 Culturally Curious
 Great Escapers

Most visitors to Ireland, display similar expectations, motivations and desires from their 'Ireland' holiday. They all want to get away from it all, have fun, experience new things, meet locals etc. They all seek a city break and enjoy a touring holiday. They enjoy nature, walking and boat trips, local food and music.

It is the degree to which certain segments **distinctly** behave and purposefully seek out certain experiences over others that makes them **distinctive** and interesting.

Here we focus on the distinctions and nuances surrounding the Great Escapers. We will look at who they are and what motivates them. What are they looking for from a holiday in Ireland, how they come to book their holiday – their holiday journey, and more importantly what we need to know and do as tourism businesses and destinations in order to grow market share from this segment.



Figure 1

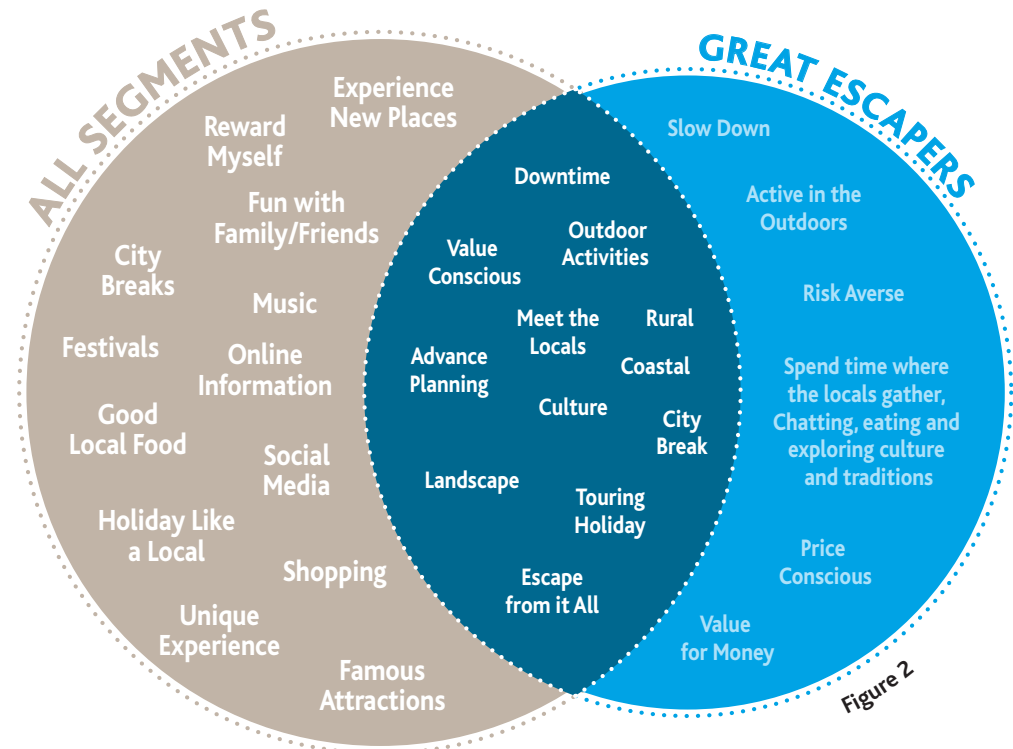


Figure 2

¹ Great Britain excludes Northern Ireland

Great Escapers highlights

Great Escapers are

- 1 In need of downtime to escape from their busy lives so they can reconnect with themselves and loved ones.
- 2 Sociable and enjoy interacting with local people as a means of understanding the living culture and hearing their stories through music, food and dance etc.
- 3 Connected with nature and enjoy experiencing and watching the changing landscape as it can offer respite they need from everyday life.
- 4 Memory makers and will want to make treasured life-long memories while on holiday with their family and/or friends.
- 5 Off season travellers and will travel mainly in Spring and Autumn.
- 6 Independent, will hire a car and spend one to three days in a city and then tour mainly in a rural area to discover the local hidden gems.
- 7 Very price and value conscious.
- 8 Planners and need a lot of reassurance, planning and seeking personal and trusted recommendations before and during their holiday.
- 9 Value seekers who will stay in a variety of good-value, quality local accommodation from B&Bs to self-catering.
- 10 Active and enjoy outdoor activities such as walking, hiking, cycling, water activities, boat trips etc.



Who are they and what motivates them?

Visitors who are looking to escape from it all; seeking a badly needed break from the everyday pressures of work and home

Great Escapers are the segment which are the most motivated by the need to spend **quality time together**, enjoying new experiences, learning about other cultures and exploring new places together in order to create lasting memories. Great Escapers span a range of age groups with most of them aged between -34 to 54². They have a slightly higher tendency than other segments to have children; however, they travel just as often as a couple as they do with children. The goal is to return home recharged and invigorated, helping them to balance and reassess what's really important in life.

Great Escapers are looking to experience **natural beauty** in gentle isolation; to chill out and slow down. They wind down by enjoying the beauty of the landscape and being connected to nature. **Rural touring holidays** which provide the promise of local, authentic communities and activities are top of their list. However, they will expect to incorporate a stay or visit to **one or more cities** as part of the itinerary.

Great Escapers are largely **risk averse**; they are not very interested in being the first to try new things. They therefore **need reassurance** that their choice has been 'tried and tested' and openly seek feedback and recommendations from others to help them decide. They are not particularly large users of social media they prefer **personal recommendations** from people they know.

They are not as well travelled as other segments and tend to revert to similar holidays in similar countries/destinations. They often feel anxious and worried about their finances; they are therefore very **price and value conscious** and focus on finding good value for money. Hence, they look for bundles and all-inclusive offerings. Destinations which deliver on the Great Escapers motivations, will reap the rewards of their loyalty, promoting repeat family **memory-making** visits for years to come.

Great Escapers are the most pragmatic of all the segments in their approach to holiday decision-making; they focus on what they want to get out of the holiday rather than the destination itself.

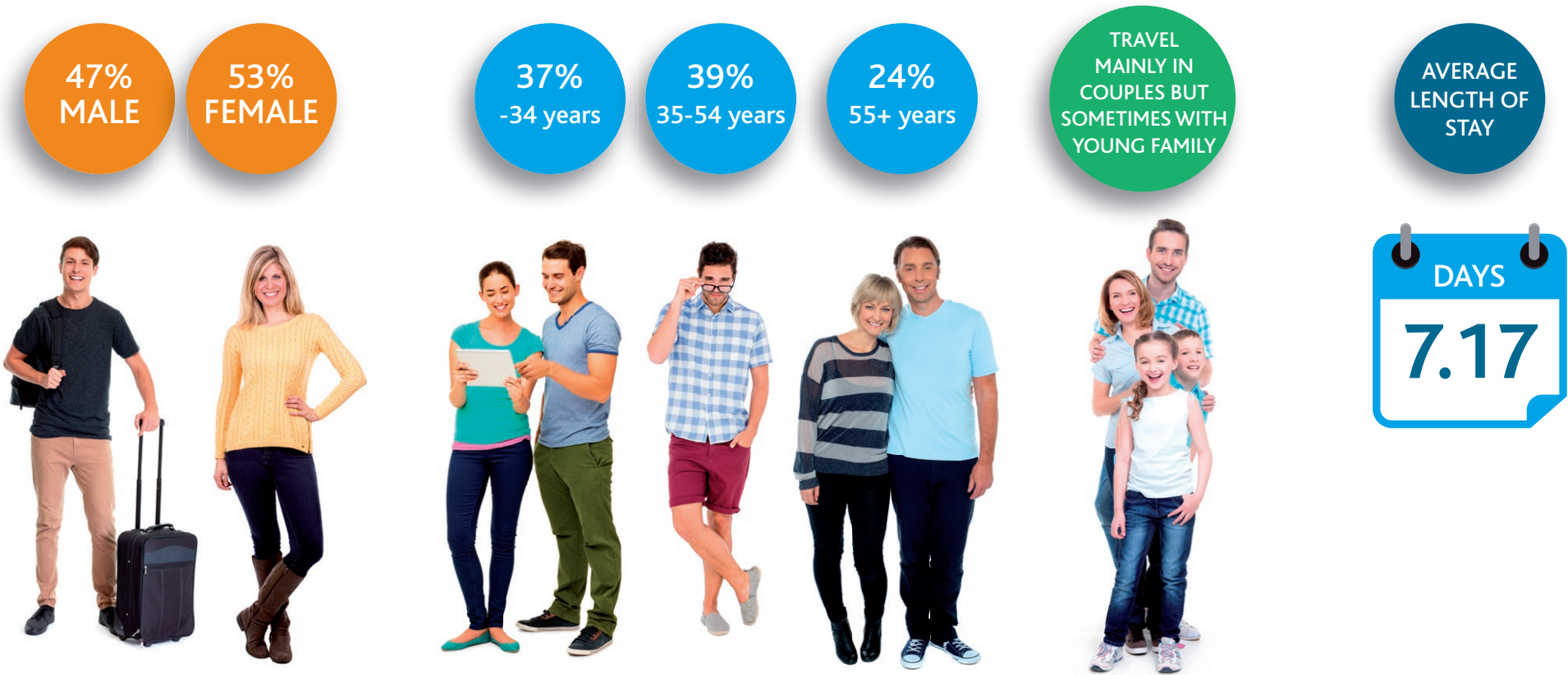
Despite their cautious nature, they do take holidays and they will spend. They are also the group which are most likely to book **package deals**, take **longer holidays** and **tour a wider area** (even the more isolated locations) and are likely to return, hence they are of significant economic value to Ireland. They will typically spend an average 7.17² days on holiday where 1 to 3 of those days is spent in a city or urban environment and the majority spent touring a rural area.

Great Escapers are the segment which are the most motivated by the need to spend **quality time together**



Great Escapers plan well in advance

This group have perhaps the broadest range of factors to consider in choosing and booking a holiday. They have to satisfy the disparate needs of an evolving family unit, with the need for assurances, quality, escapism, safety, cultural enrichment, and those vital memory-making experiences, while still getting what they perceive as value for money. Not surprisingly, they **plan extensively and well in advance** and weigh up all their options before making a final decision. Great Escapers will seek advice and reassurance from tourist offices, online and from locals at regular stages throughout their holiday – i.e. official and trustworthy sources.



^{2/3} Data sources: Fáilte Ireland Survey of Overseas Travellers, 2015 and Fáilte Ireland Global Segmentation Research, 2015

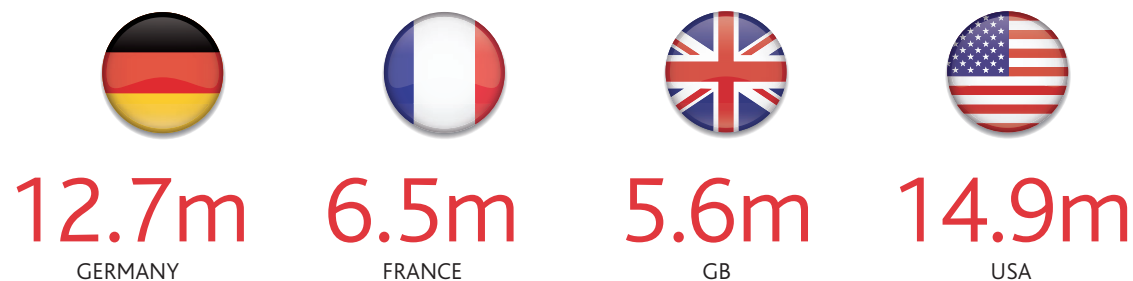
60% of visitors are from mainland Europe

Mainland Europe markets of France and Germany present a sizeable market opportunity of 19.2m Great Escapers⁴; 25% of all Great Escapers who visited Ireland in 2015 came from Europe, with Germany being dominant². Being in the Eurozone with ever-improving access, and having a good understanding of Ireland's brand destination and a greater propensity to travel beyond Dublin, positions Germany and France as strong prospects for Ireland's destination experience offering.

The GB market, on the other hand has a smaller Great Escaper market, in terms of numbers of people, at 5.6m³. However, in 2015, 12%² of all Great Escapers visiting Ireland came from GB, which indicates that GB visitors have a greater propensity to visit given their proximity and ease of access. The recent uncertainty in relation to currency and value arising from Brexit, coupled with the need for Ireland's Ancient East and the Wild Atlantic Way to compete with GB in terms of an easier and evolved staycation market, presents significant challenges for the GB market in 2017 and beyond.

Given the overall geographical size of the USA it is therefore of no surprise that the USA is the largest source market for all segments. The importance of the USA market is borne out in past performance where 16% of all Great Escapers to Ireland in 2015 came from the USA². Although the USA is set to remain a dominant Great Escaper source market, it is important to consider external factors that may impact on the American visitor coming to Ireland. Factors such as travel costs, journey time and, in particular, escalating safety issues, may impact on the likelihood and frequency of travel from the USA. Therefore, all markets are important.

Segment size by market, 2016 (millions)



⁴ Source: Tourism Ireland GTI Survey, 2016

€90.46

Great Escapers average spend per day

Stay longer

than the average overseas holiday maker



What are they seeking from a holiday in Ireland?

When Great Escapers think of their ultimate 'get away from it all' holiday, Ireland is one of the destinations at the top of their list alongside destinations such as Scotland.

This is good news; although there is also a challenge for Ireland to ensure it has strong and distinctive points of difference above other similar 'cultural-landscape' destinations such as Scotland. Equally positive is the Great Escaper's high intention to visit Ireland. Great Escapers from Germany and the USA are the most positive towards Ireland as a holiday destination whereas Great Escapers from the UK and France are more critical and need a more compelling sell. Despite the positive disposition of Great Escapers in general towards Ireland, there is a challenge for Ireland to move 'intention' into 'action'.

The core emotive need for the Great Escaper is to **immerse themselves** into Ireland through a series of unusual and seasonal experiences. First and foremost, driving through the scenic, rugged, unspoilt, primal landscape. Then experiencing first-hand the stunning tracts of landscape via walking and cycle trails, and strolls along the beach, etc. They are very much **interested in living, rather than observing, the landscape**.

Ireland offers the promise of beautiful, unspoilt land and seascapes, authentic culture, magical moments, a focus on people, togetherness and family and an earthy 'realness' which Great Escapers seek as a **respite from their busy lives**.

Great Escapers are therefore most likely to visit Ireland in the **Autumn or Spring**, when nature is going through a transformative phase, when there are fewer mainstream tourists (and therefore more authentic experiences), when prices are more attractive and when missing the good weather is not an issue. The challenge is to ensure there is enough to see and do in the off-season.

Social Interaction with local people is really important to Great Escapers. They see the **people and landscape as being somewhat fused**. Together they deliver an almost magical sense of a truly original and ancient culture, full of mystic, magic, character and unparalleled traditions and of course strong family, 'people first' values. Great Escapers have **little real interest in more formal cultural artefacts** such as museums, historical trails, but rather enjoy interacting with and having fun with local people. They also enjoy **local people being interested in them**; it provides them with the reassurance that they and their lives are interesting to others. Great Escapers will seek opportunities for local interaction in a fun local and authentic environment; for e.g. local music, dance, pub, festivals. While the local Irish pub is an obvious (and important) social touchpoint for Great Escapers, so too is the opportunity to stay in smaller, more authentic guesthouses/B&Bs, hostels, working farms.

DID YOU KNOW? German Great Escapers

- are the most interested in everything Ireland has to offer and display the highest intention to visit.
- enjoy connecting with the beauty of the landscape while on holiday.

DID YOU KNOW? French Great Escapers

- are relatively more critical of the Ireland offering.
- enjoy connecting with the beauty of the landscape while on holiday.

DID YOU KNOW? USA Great Escapers

- are relatively warm to the idea of a holiday in Ireland but are not sure what they would do once they arrive hence indicate a lower intention to visit.
- display a higher interest in Ireland activities and experience brands than those from GB.
- enjoy connecting with the beauty of the landscape while on holiday.

DID YOU KNOW? GB Great Escapers

- are relatively more critical of the Ireland offering.
- are relatively warm to the idea of a holiday in Ireland but are not sure what they would do once they arrive hence indicate a lower intention to visit.
- most enjoy chilling out while on holiday.

The food experience is as much about witnessing quality local cooking in local restaurants and pubs as it is about the meal itself.

Great Escapers will want to **get active together in the outdoors**. Therefore, activities need to be appropriate for a couple or family unit of varying age and ability and can range from walking, hiking, cycling to visiting an outdoor adventure park or hiring a boat and spending a day or two cruising along Irelands waterways. Great Escapers will need reassurance and information around safety, quality assurances, transparency around cost, "do's' and don'ts", location, services, food, transport, timings etc.

Great Escapers will also want to visit the top attractions, but they're not interested in interacting with other tourists preferring to be surrounded by the 'real Ireland'. They will want to feel a strong connection to the story behind the attraction, that they have had fun together and learned something together which will form part of their lifelong memory bank.

It is important to remember that touring in itself is a holiday experience for the Great Escapers and it is therefore important that they feel both safe and familiar with the area. They want to succeed in their own explorations and need to feel self-enabled. Easy, understandable wayfinding and multi-lingual tourist information, good local knowledge and efficient facilities and supporting services are critical to the touring experience.

Great Escapers like touring and finding their way around themselves by exploring the destination therefore it is vital that they have a clear sense of the **geographical layout of the country**. This has been stated as a barrier, and this in itself, is a major inhibitor for the Great Escaper as they are risk averse and like to plan in advance some of the finer details of their trip i.e. how long it is likely to take and even, consequently, how much it might cost to complete their journey.

Wild Atlantic Way

The Wild Atlantic Way proposition is more appealing to the Great Escapers from all markets than to any other segment. It epitomises how they view Ireland; almost in a mesmeric, romantic and mystical way, an untouched wilderness, full of varied and extreme landscapes; all preserved. The Wild Atlantic Way's unique Atlantic culture and people, whose lives, like the landscape, have been shaped by the sea is equally evocative. It is believable, true, warm, wholesome, faithful and authentic; mirroring Great Escapers own values around family and spending quality time together.

Having a number of cities and large towns on or near the Wild Atlantic Way adds to the appeal for the Great Escapers who will seek a mix of rural and urban experience.



BE AWARE

- The vast majority of Great Escapers will wish to fly directly from their destination City airport to Dublin, rent and pick up a car at the airport, and begin their adventure immediately.
- Great Escapers express their travel needs in terms of the number of hours it takes to travel from their home to their main destination, door-to-door.
- Door-to-door travel times to Dublin from London, Manchester, Munich, Paris etc. need to be estimated, and referred to in communications.
- The ease with which a car can be pre-booked, or booked upon arrival, needs to be stated so as to remove any sense of stress from the equation.
- While one means of plugging this knowledge gap is to provide visual schematics of the country and estimated drive times from key hub to hub (mental map), an absolute requirement for both the Wild Atlantic Way as a linear route and for the more varied touring routes of Ireland's Ancient East.



Being active together along areas of particular beauty and natural interest such as trekking, horse-riding or cycling through national parks, beach and water activities, cliff top walks, boat trips to the islands and whale/dolphin watching is top of their list for Great Escapers. The true, natural wildness of the Wild Atlantic Way is critical for this group and needs to permeate their entire holiday. Wild land and seascapes; the true colours, smells, textures and taste of real food; the flora and fauna; the wild care-free nature of the people, their traditions and customs and even the wildness of the weather all add to that sense of 'a place apart' which Great Escapers most desire from a holiday.

Ireland's Ancient East

The prospect of getting out and active in a lush green landscape, seeing local towns, villages and communities being brought to life through colour, festivals, arts and food and the overall fusion of an enriching culture, a land of stories told by the local people is really motivating for Great Escapers. The mystical and somewhat magical tone of Ireland's Ancient East brand appeals to this segment. Almost fairy tale like, but firmly rooted in strong values, traditions and truths. Great Escapers are less interested in museums or more formal heritage attractions but will enjoy learning through local stories and people in communities and through their touring and explorations. Ireland's Ancient East with its easily accessible multi-city options and large towns and endless touring options (by foot, bike, car, inland boat cruising) ideally complements Dublin as part of a longer stay Great Escaper itinerary. The challenge for Ireland's Ancient East is to present easily navigable touring routes which can be quickly and easily understood. This provides the assurances and confidence which Great Escapers need.

Dublin and Ireland's Cities

Although the mainstay of their typical holiday will involve escaping into and engaging with nature, a few days (between 1-3 days) will be spent exploring Dublin and the city's 'iconic' sights (Guinness Store House, Dublin Castle, Trinity College, etc.) during the day, but also the opportunity to explore the **real** Dublin, encountering real Dubliners, by night.

As with most segments, Great Escapers want to experience 'the lesser known Dublin' through walking tours of coastal villages; engaging in the local entertainment scene, and local bars and restaurants.

Apart from Dublin there is little knowledge or appreciation of other cities (with the exception of perhaps Cork and Belfast), although it is assumed that their travels will take them through a variety of smaller towns or villages, where they imagine spending their evenings. The non-Dublin urban experience is about identifying smaller towns and villages of great architectural and historical character, staying in local accommodation, eating authentic food and having social interaction and listening to local music.

The low awareness of cities beyond Dublin presents a significant opportunity for the cities within Ireland's Ancient East and along, or close to, the Wild Atlantic Way to become touring stop-overs for Great Escapers.



What influences their holiday decision?

Great Escapers are very practical in their comparison of destinations. They focus on what they want to get out of a holiday rather than on the destination itself. Their choice of holiday is therefore very dependent on a destination clearly demonstrating they can deliver on their holiday 'wishlist'.

Their key motivation for a holiday is essentially seeking an escape from the pressures of their everyday life by slowing down to a different pace of life, feeling connected to nature and enjoying the beauty of the landscape. Everything on their holiday 'wishlist' they see as helping to achieve this. For example, they like to be moderately active on a holiday and will research (using both online and offline resources) local activity options to ensure a diverse range available.

Great Escapers are not risk takers and opt for a 'safe' option that will deliver on their expectations. They therefore refer to **official and trustworthy sources of information** such as **tourist board websites and literature** and are highly influenced by **customer reviews**. They are the most likely of all segments to book a **package deal**.

The Great Escaper will **research extensively** various price options both **on and offline** and choose the best package deal. They value **word of mouth** from family and friends and can influence potential future visitors to go where they have been. They are **not high users of social media** so once in a destination they like to receive or gather information via **local people and literature**. Once they return home they will share photos and experiences online via Instagram, Facebook and more importantly will chat to their family and friends about what they experienced on holiday.



RESEARCH EXTENSIVELY
VARIOUS PRICE OPTIONS
BOTH ON AND OFFLINE

THEY WILL SHARE PHOTOS
AND EXPERIENCES ONLINE
VIA INSTAGRAM, FACEBOOK

WILL CHAT TO THEIR FAMILY AND
FRIENDS ABOUT WHAT THEY
EXPERIENCED ON HOLIDAY



The visitor journey

The visitor journey depicts the stages a visitor typically goes through when taking a holiday.

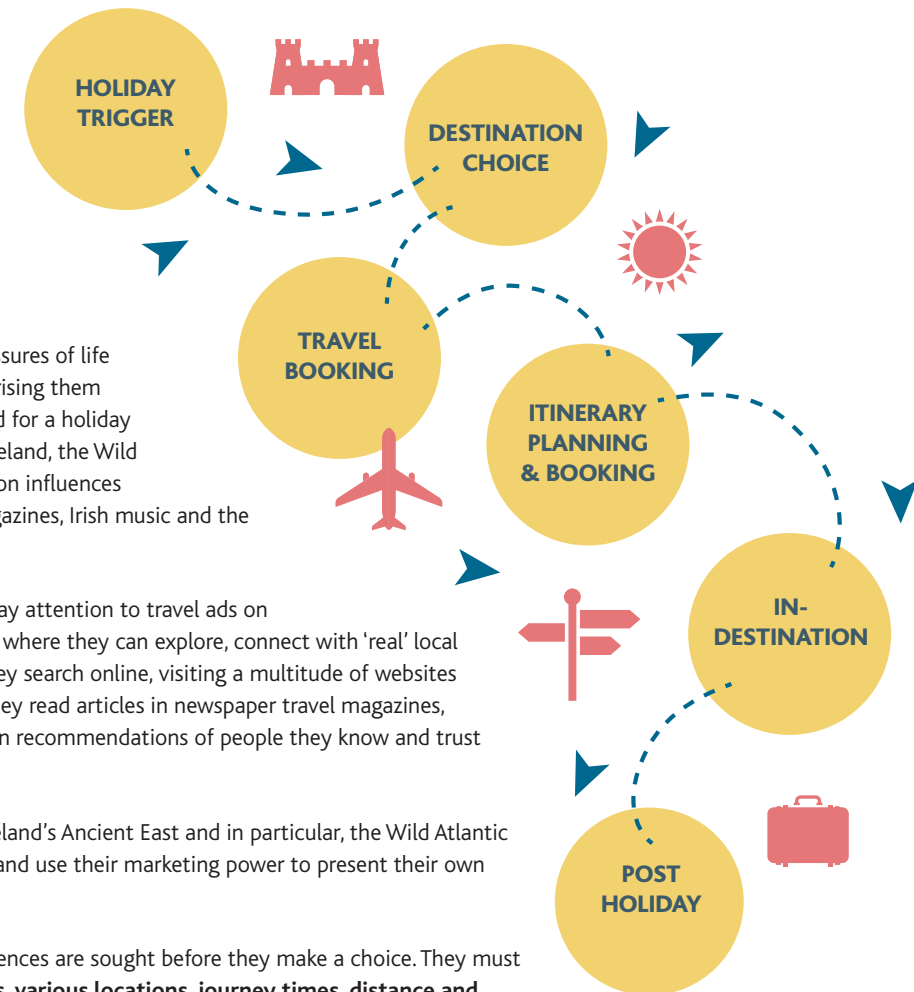
The **initial motivation for a holiday** stems from the need to get away from it all, escape from the pressures of life and reconnect with loved ones. Great Escapers consider a number of countries and destinations categorising them under "great landscape"; 'good for scenery' 'good for hiking' "great authentic culture" etc. Once the need for a holiday is triggered, this consideration list is called upon. Hence the importance of international marketing of Ireland, the Wild Atlantic Way, Ireland's Ancient East and Dublin by Fáilte Ireland and Tourism Ireland. However, destination influences come from a wide mix of sources such as recommendations from people we know, documentaries, magazines, Irish music and the arts etc.

Great Escapers notice travel related content on their social channels, search online for inspiration and pay attention to travel ads on TV, print and online. They will be particularly interested in destinations with cultured landscape; a place where they can explore, connect with 'real' local people, experience new things, have fun and new adventures together and make life-long memories. They search online, visiting a multitude of websites such as: tourist board sites, travel review and travel agent websites and will review travel guidebooks. They read articles in newspaper travel magazines, watch travel related videos on YouTube and browse pictures on Instagram. Great Escapers rely heavily on recommendations of people they know and trust in helping them decide on one destination over another.

Here the top internationally-recognised attractions along with distinctive destination brands such as Ireland's Ancient East and in particular, the Wild Atlantic Way come to the fore. Therefore, it is important that tourism businesses are aligned with these brands and use their marketing power to present their own business experience to an international audience.

The **travel booking stage** is quite complex; a variety of on and offline sources of information and influences are sought before they make a choice. They must be easily able to conjure up a **mental map** that is **instantly navigable communicating ease of access, various locations, journey times, distance and a sense of lots to see and do**. Failure to provide essential information early on in the visitor journey could result in Ireland being seen as 'too difficult', 'too vague' and therefore too risky, and the potential visitor goes elsewhere. At this stage the focus is on practical information around travel and accommodation and an assurance of lots to do. Stress free transport connectivity is very important as Great Escapes will want to eliminate travel delays and problems. They start the journey clock from the moment they leave their home until the point of final arrival to their accommodation so it is therefore important that full travel information and timelines are provided up front.

Great Escapers search online for the best deals in flights, car hire and then research accommodation (hotels, B&Bs, self-catering) options that are near to beautiful places with the right mix of escapism and exploration. They also search for offers for couples and/or families.



Generally, transport (including car hire) and accommodation are booked in advance; things to see and do are not booked in advance unless central to the holiday, such as concert/festival tickets or to ensure access to an attraction that requires pre-booking. However this is set to change as more and more online tour operators (OTAs) are starting to push booking facilities for a wider range of experiences. Being cautious and value conscious, Great Escapers spend the majority of time at this stage to ensure they secure the best deals and make the best choice. It is really important that Ireland's tourism offering makes an impact at this stage offering a range of price points and options, quality experiences and good practical information.

Great Escapers spend the most time of any segment **planning their itinerary**. Itineraries provide assurance against boredom or disappointment and help mitigate against unforeseen costs. Whereas a large amount of itinerary advice will be sought through personal recommendations, Great Escapers will search online for more detailed, up to date information and special deals.

On arrival, the destination must work and live up to the promise. Businesses that proactively work to ensure visitors have lots of choice and receive the very best destination experience will benefit most. Local information sources are particularly important for Great Escapers including tourist offices, accommodation providers, restaurants/bars, taxi drivers etc.; all of which should be an advocate for your business. Great Escapers will be looking for the real story locally; going where locals go where they are assured of a genuinely different, and less touristy experience as well as local prices.

The post-holiday experience is often overlooked, missing an important opportunity to maintain a connection with the visitor for mutual benefit – their memories and choices are reinforced through word of mouth and your business experience is widely promoted. On return home, they put together albums of the trip, share photos and videos of the spectacular scenery and family/friends photos engaging in outdoor activities via Facebook and Instagram. They write online reviews and recommend Ireland as the perfect Great Escape destination to their family/friends (off and online).

Great Escapers tend to take the same type of holiday each year and are highly likely to return if the destination experience lives up to their expectations. There is an opportunity to tap into their loyalty, their family memories and their price-consciousness by collecting customer data and contacting them with incentives to return.



The Great Escaper journey



GREAT ESCAPER INSIGHT

I need to escape from the pressures of my daily life – complete downtime!

DESTINATION PRIORITY

Get on the radar; strong interest in touring Ireland's unspoilt 'cultural' landscape and in particular the Wild Atlantic.

Increase on and offline publicity particularly focusing on the destination's environmental and cultural profile.

Encourage word of mouth via Trip Advisor and other review sites.

INDUSTRY PRIORITY

During the holiday trigger stage the visitor prioritises where they are travelling to - the destination, rather than the business.





GREAT ESCAPER INSIGHT

Value recommendations by

Colleagues, peers, friends, family

Environmental media

Cultural media

Recognised famous sights/must see attractions and famous historical events will appeal to them.

Cultural Events & festivals (e.g. music, food, arts) will also appeal to them.

Value is important and they will seek a quality destination with a range of value price points to select from.

To be considered, a destination must appear easy and safe to get to and navigate around. Direct access – door to door journey time. Require mental map of destination for reassurance before booking. Want to tour extensively therefore need lots of assurance around destination infrastructure, services, orientation, distances, pitfalls and hidden costs etc.

DESTINATION PRIORITY

Accentuate the unspoilt landscape – scenic unpopulated images, environmental designations, accolades such as UNESCO.

Show images of outdoor activity within the landscape (walking/hiking etc.)

Present the area as a touring route with suggested itineraries for couples and families.

Highlight towns and cities along the touring route.

Present a unique and accessible local culture, through local pubs, music, festivals, crafts, traditional sports and the arts.

Highlight top attractions; that have great local stories etc.

Promote easy-access, ease of touring, friendly locals and quality accommodation.

Supported by a clear mind-map of lots to see and do and how visitors can get there, including transport options, journey times, distances, weather, recommendations and all relevant information.

Highlight quality, fresh local produce, sustainably produced, well prepared in local restaurants and bars.

Get involved with digital marketing; present a strong image and video bank; curate and re-purpose blog posts and ensure influential peer sites such as Trip Advisor are advocating the right message.

INDUSTRY PRIORITY

Ensure your business is visible on Fáilte Ireland's websites: the Wild Atlantic Way, Ireland's Ancient East and Visit Dublin.

Curate and re-purpose blog posts.

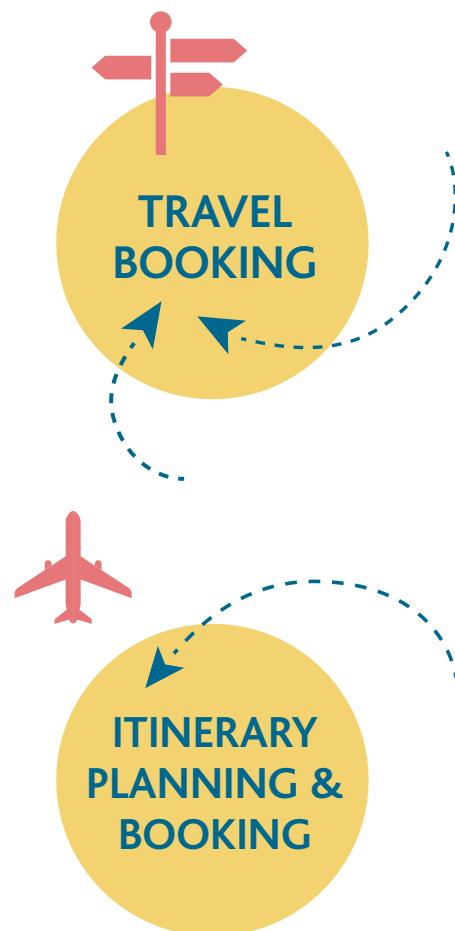
Invest in Web optimisation and paid searches using key phrases.

Ensure positive recommendations on advocacy sites such as Trip Advisor.

Optimise on and offline publicity from any angle possible (cultural media, environmental, nature and travel media).

Watch for topical trending opportunities particularly topics or people connected with rural and touring holiday destinations, the Wild Atlantic Way and Ireland's Ancient East, and link them to your business or location where possible.





GREAT ESCAPER INSIGHT

Book primarily online. May seek reassurance from travel agent but essentials such as transport (flights, ferry) car-hire and accommodation are primarily booked directly through online channels.

GREAT ESCAPER INSIGHT

Plan a full itinerary, with varying options, in advance of arrival as assurance of covering off all the best attractions.

Will review and update the itinerary every few days drawing on local knowledge from tourist offices and local people to ensure covering off the very best local experiences and 'hidden gems' and receiving the best local offers.

DESTINATION PRIORITY

Ensure the destination visibility and top experiences are strong across all on and offline media and ensure that everything on offer can be easily and instantly booked online.

Use social media and trending tools to ensure the destination is 'constantly trending' with relevant messaging and experiences for Great Escapers.

All booking platforms must be mobile enabled.

DESTINATION PRIORITY

Provide practical information: journey times, distances, weather etc.

Provide information in various languages in order to make exploring easier and reduce anxiety.

Ensure the destination communicates a large array of things to see and do, highlighting the key attractions and the most locally distinctive cultural experiences including local entertainment, sport (GAA), Gaelic language and islands experiences.

Offer seasonal/tactical events and offers to drive sporadic bookings.

Ensure activities and attractions can be booked easily and directly on mobile with full disclosure of all costs and value pricing options.

INDUSTRY PRIORITY

Accommodation and transport providers in particular must be mobile ready and must be present on as many booking sites as possible (including OTAs) with special value offers, particularly pushing value offers outside of peak season.

Package bundles and all-inclusive offers wherever possible; highlighting the savings to the customer.

INDUSTRY PRIORITY

Be present and visible on all digital platforms – the business must be mobile ready.

Your website must have a booking mechanism.

Ensure you are using strong landscape images along with images highlighting activities for couples and families in stunning landscape. Include evening images of socialising with locals in local bars and restaurants, festivals.

Offer tactical incentives, and all-in packages to encourage impulse-buying.

Partner with another business from your area to produce value bundled offers.

Use, curate and re-purpose blog posts.

Invest in Web optimisation and paid searches using key phrases.

Ensure positive recommendations on advocacy sites such as Trip Advisor.



IN- DESTINATION



GREAT ESCAPER INSIGHT

Stay locally in a range of accommodation (B&Bs, hotels, self-catering) mostly in a rural area (village or town) and explore from there by hiring a car.

Will stay in one to three different locations as part of the touring holiday – one likely to be a city.

Although will visit famous 'must-see' attractions, generally avoid tourist traps and will opt for more genuine, local experiences.

Enjoy social activity; preferably where the locals go. Local restaurant, bars, festivals and cultural/sporting events.

Great Escapers want to feel they are among people who are interested in them and their lives.

Understanding how local food is made and prepared is an important part of connecting with the landscape.

Want to log their holiday experiences together as part of their life-long memory bank.

Will actively take and share pictures of themselves in stunning scenery.

GREAT ESCAPER INSIGHT

Openly relay their experience: positive reviews are relayed to friends and family.

High likelihood to return and will actively encourage others to visit.

DESTINATION PRIORITY

Both off and online practical visitor information is vital. This group want relevant, real local information to avoid the tourist trails and to reduce risk of missing out on experiences or deals.

Daily "what's on" listings are critical, particularly related to the local scene rather than 'tourist information'.

Great Escapers prioritise recommendations from locals. Key local people such as tourist information staff, taxi drivers, concierges, publicans, café/restaurant staff, craft shops etc. among others are critical in providing the inside track.

DESTINATION PRIORITY

Continue publicity on and offline to reinforce positive memories.

Actively encourage 'memory collecting' and 'memory-making' by providing opportunities to collect souvenirs or 'achievements' and encouraging photo taking and sharing (for e.g. Wild Atlantic Way passport and viewing point markers).

Ask them to return – provide value incentives for them and their friends to holiday.

INDUSTRY PRIORITY

Ensure all visitor facing staff are fully informed to be able to advice on where the locals go and the truly authentic 'must-see' experiences.

Start up a conversation! Make the visitor feel special and interesting.

Ask for contact details and develop a database which can be used for further marketing.

Ensure you work with your local tourist information office.

Encourage visitors to share positive reviews.

Surprise them with something which can act as a souvenir of their holiday together.

Cross promote with relevant local industry partners to upsell experiences; keeping it local and keeping it real. Provide special value incentives.

Ensure local accommodation providers are fully aware of and advocate your business.

INDUSTRY PRIORITY

Share a social media memory and ask them to return perhaps with family to reconnect, explore and make more memories together.

Gather user-generated content for your website.

Engage in social media conversations.

Run competitions to promote advocacy i.e. share a photo or a caption about something you did on holiday.

POST HOLIDAY



Destinations need to

- Use images that are stunning and enticing on all of your marketing material.



- Offer an authentic experience that shows the real Ireland and life of the Irish people.



- Show engagement with the landscape through gentle activities such as walking, cycling, hiking and gentle water-activities including boat-trips highlighting what's special about the land/seascape in terms of flora and fauna.



- Highlight 'Big Ticket' items; famous attractions and events with worldwide reputation which reinforce the 'quality' and depth of the destinations. Include accolades which elevate the destination's international status around nature, the environment and living culture such as UNESCO status and protected areas designated with special environmental and wildlife qualities.



- Ensure all required information about the destination is easily and readily available in a language that can be understood by the visitor. Including transport details both door to door and in-destination, connections, distances, journey times by foot, car and costs etc.



- What's on locally: present 'hidden gem' experiences that are beyond the tourist trail including local cultural, sporting and community events. Information on where the locals go, highlighting good value for money, locally sourced food and entertainment.



- Show local people, treating visitors as locals, in marketing material.



- Offer different options of touring and exploring the area such as by boat including 1-3 day boat cruising of inland waterways.



- Promote access to Gaeltacht areas to allow visitors experience the native language first hand in a relaxed, community setting.



- Promote the islands off Irelands West Coast as a very unique and authentic cultural and environmental experience.



- Promote and tell the local stories of regional historical sites in a fun and entertaining way for all the family.



- Offer a range of accommodation options and price points in villages, towns and cities.



- Build in a loyalty programme to incentivise Great Escapers to collect memories and return to build on their bank of memories.



Businesses need to

- Align your business offering with an Ireland destination brand (either Ireland's Ancient East or the Wild Atlantic Way).



- Use impactful landscape images and video content - not only as a means of attracting business, but also while the visitor is with you and after they leave. This keeps the conversation going, keeps the memory going and encourages wider sharing and promotion of your business.



- Think of how you can either present your current business offering or modify your offering to connect more to the local landscape and local culture.



- Consider how to offer all-inclusive or packaged options and promote special offers across all channels, especially digital channels.



- Your website needs to be easy to navigate and easy to book (for desktop, mobile and tablet). Make your 'contact us' details prominent.



- On social media, write highlighted posts based on hidden gems, get away locations etc.



- Utilise paid search (Adwords) to appear for relevant search terms (your business name and local activities).



- Use retargeting advertising (remarketing) to push a final sale. These ads target people who have visited your site but did not convert on the first visit.



- Monitor review sites (Trip Advisor etc.) and respond to comments and actively encourage visitors to leave positive reviews and share photos.



- Speak specifically to Great Escapers core motivations by tapping into their need to feel transformed, to reconnect and reenergised by drawing on people values and their desire to create lasting memories from their time on holiday.



- Know how to manage the yield in your business in order to effectively and profitably work a number of channel intermediaries. Online Tour Operators (OTAs) are an established booking channel particularly for accommodation; but many are adding 'things to see and do' to their booking platforms which present new international sales opportunities for a wider mix of tourism businesses.



- Work as a community – both a 'business community' cross selling offerings and a 'tourism community' ensuring there are local advocates or ambassadors within the community to pass on the inside track to visitors.



- All businesses need to offer Service Excellence: making the visitor feel they are important with personal service with their needs pre-empted and being addressed by name. Service Excellence is central to the overall Experience Excellence and is particularly important to Great Escapers from the point of view of value. Although they seek good prices, they will remember value through outstanding experience delivery and service.



- Develop a customer database and ask visitors not only for their information but explore their interests as well.



- Ensure the local tourist information office is aware of and promoting your business with the correct information.



- Offer an added value food experience by sharing how the story of local produce, how it is farmed and prepared.

