

A scenic view of the Cliffs of Moher in Ireland at sunset. The sun is low on the horizon, casting a warm orange glow over the sea and the sky. The cliffs are dark and rugged, with some greenery on top. The waves are breaking against the base of the cliffs, creating white foam. The sky is filled with soft, colorful clouds.

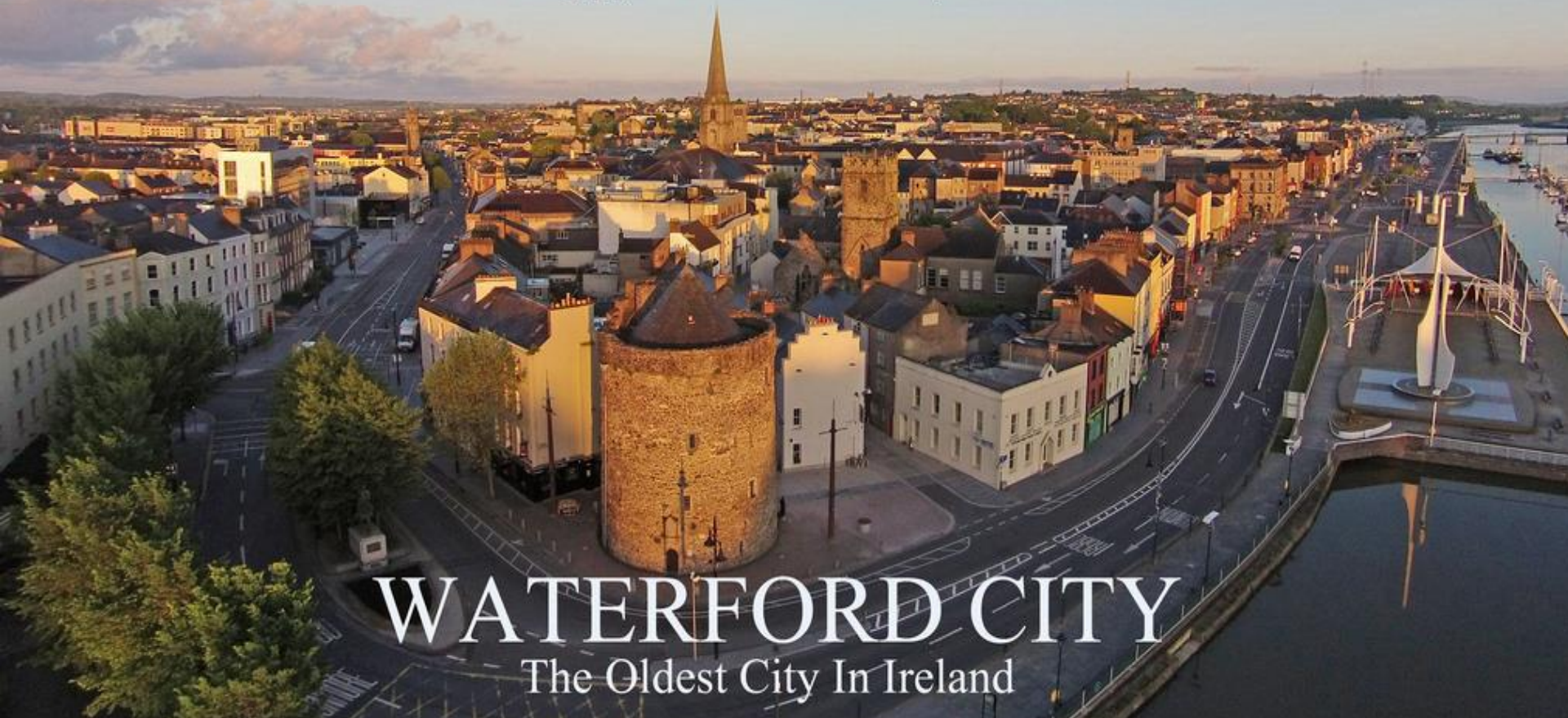
Irish Tourist Board Tourist Information Strategic Plan

Gary Breen
Head of Visitor Engagement
Presentation: Iceland 8/06/17

My Home:



Happy 1100th Birthday

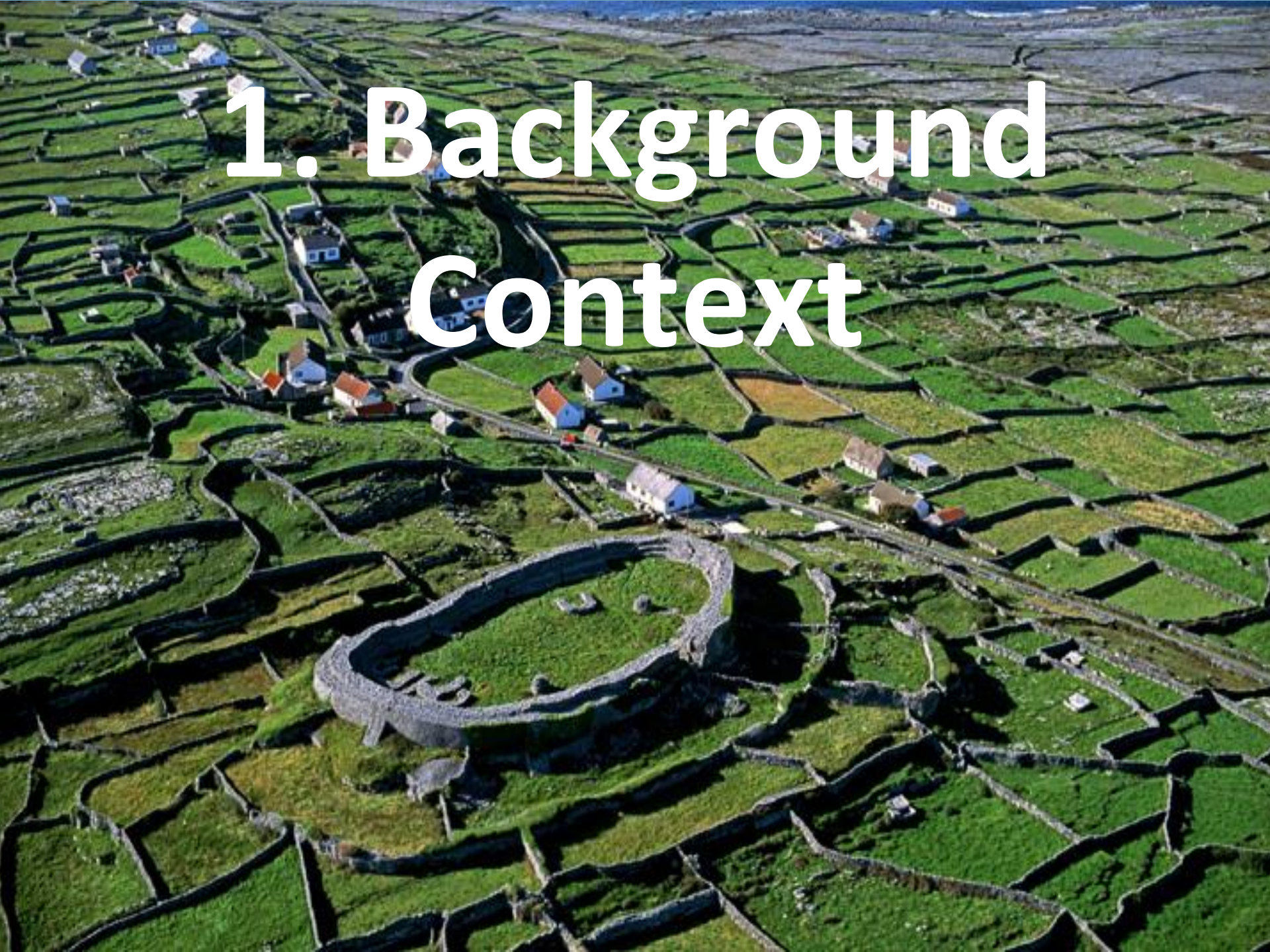


WATERFORD CITY
The Oldest City In Ireland

Agenda

- 1. Background Context**
- 2. Understand the Tourist Information Ecosystem**
- 3. Learning Journey**
 - 1. Best Practice: What we learned from Others**
 - 2. What we Learned about Digital Trends**
 - 3. What we discovered about ourselves**
- 4. So What?**
- 5. Our response**
- 6. What does that look like on a Monday Morning.**
- 7. Summary: Our Change Journey**

1. Background Context

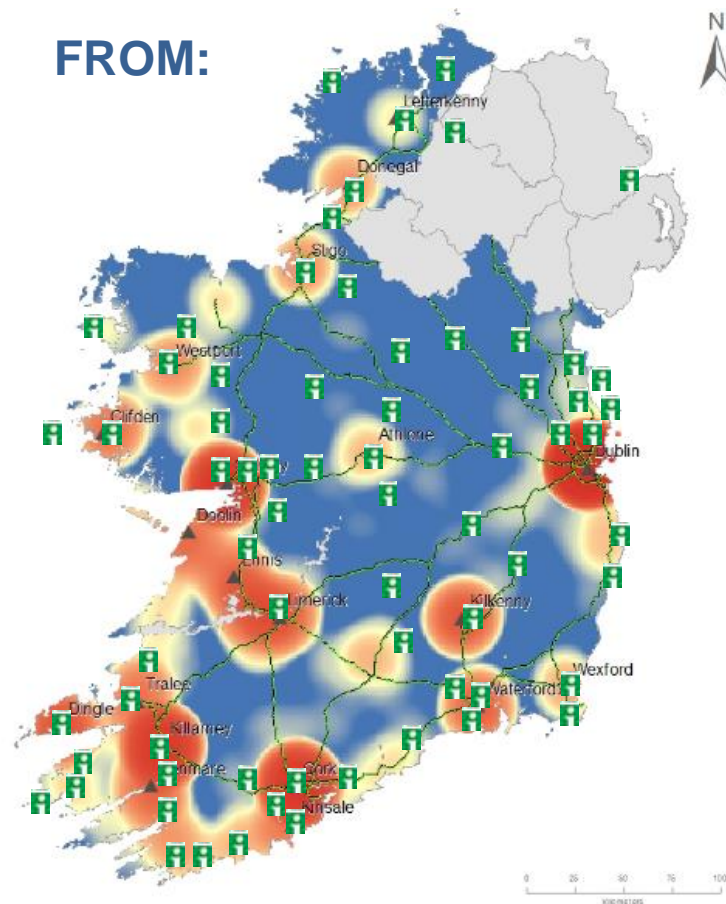


Tourist Information Office Network 2008

Services 2008:

1. National, regional and local product knowledge including geography, history, and culture
2. Information on local accommodation, attractions, shops, restaurants etc
3. Local and national accommodation booking service
4. Public transport information and route planning
5. Retail outlet for books, maps, brochures and souvenirs

FROM:

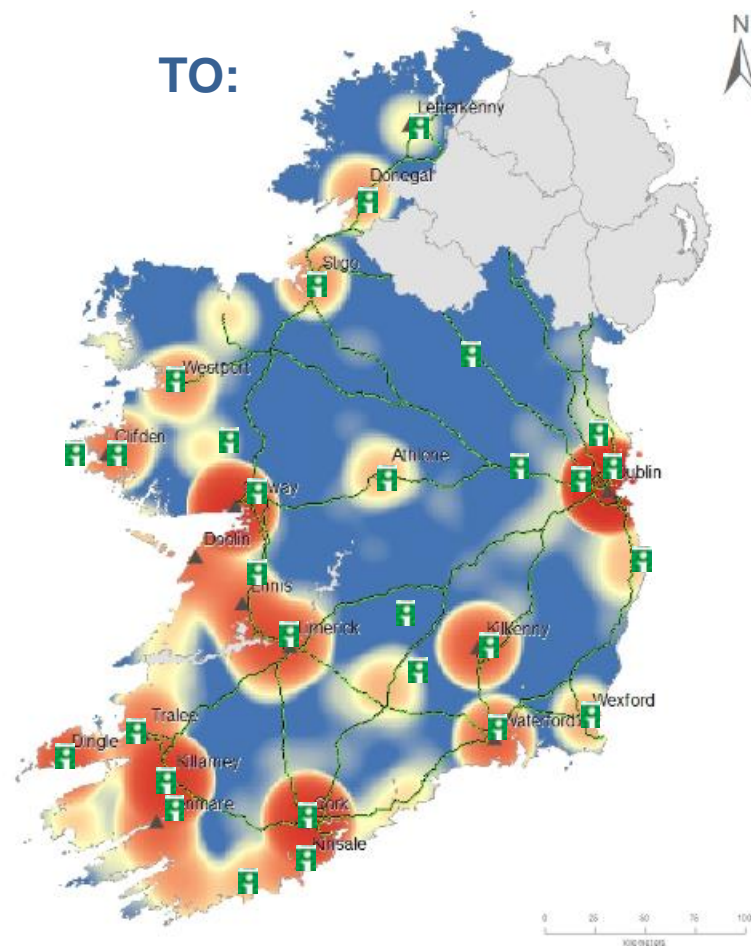


FI operated 70+ Tourist Offices

Tourist Information Office Network 2016

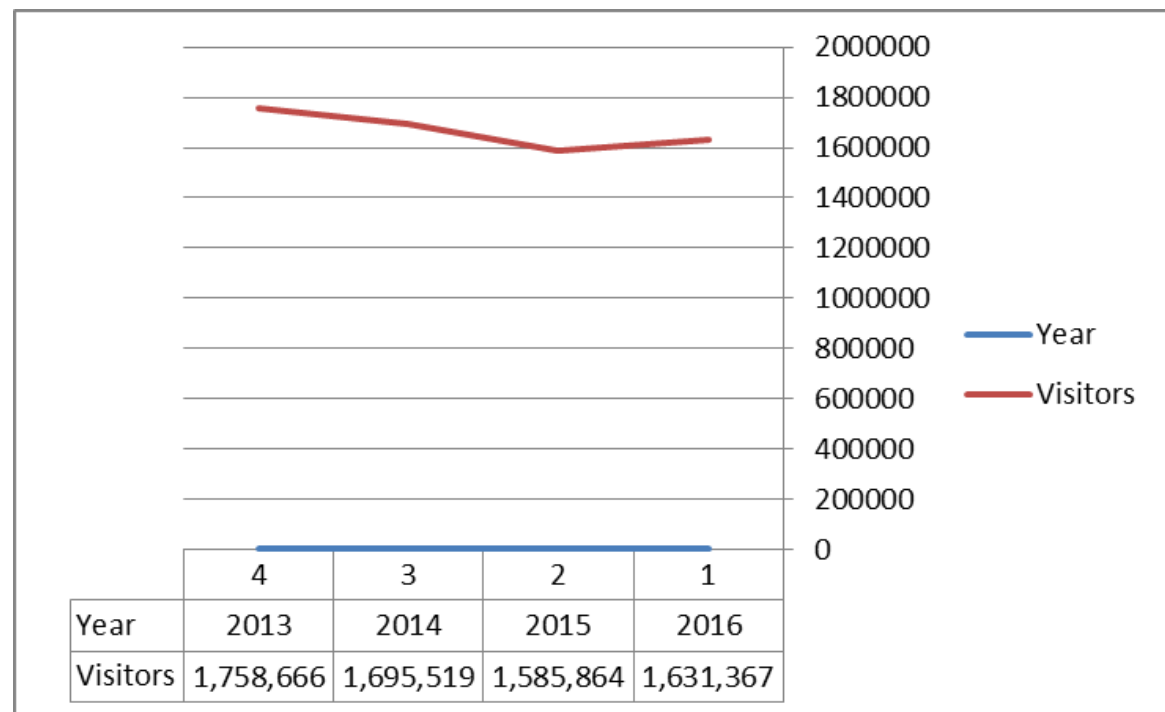
Services 2016:

1. National, regional and local product knowledge including geography, history, and culture
2. Information on local accommodation, attractions, shops, restaurants etc
3. ~~Local and national accommodation booking service~~
4. Public transport information and route planning
5. ~~Retail outlet for books, maps, brochures and souvenirs~~
6. Admission tickets for local attractions and tours
7. Call Centre (focus on telephone and e-mail enquiries)



Performance All FI Offices

OFFICE	Visitor Numbers			
	2016	2015	2014	2013
SUFFOLK STREET	178,057	160,663	329,334	370,848
O'CONNELL STREET	131,920	142,196	153,972	167,704
T2	139,879	135,989	137,160	131,072
MULLINGAR	6537	7447	8,618	7,527
WICKLOW	12719	11763	12,120	9,396
ATHLONE	19696	20209	25,215	24,328
ENNIS	73,516	40,984	26,534	29,281
LIMERICK	38,555	43,447	42,030	43,734
NENAGH	885	1,836	2,392	2,543
DONEGAL	91815	91053	87,827	65,872
LETTERKENNY	13661	13336	14,492	13,932
SLIGO	38842	38397	38,094	38,339
CAVAN	1975	1925	2,215	2,008
KILKENNY	54,551	54,568	53,375	51,406
WATERFORD	28,042	28,377	22,601	26,725
WEXFORD	20,460	21,316	22,739	24,847
CAHIR	10,900	11,457	12,263	10,673
CLONAKILTY	23,240	10,292	15,752	15,650
CORK CITY	81,523	98,452	93,154	91,341
DINGLE	156,640	150,311	151,254	154,478
KILLARNEY	112,797	103,346	90,028	83,732
KINSALE	62,173	61,518	57,282	51,961
TRALEE	66,180	57,149	31,983	37,820
KENMARE	32,454	21,193	21,190	17,863
ARAN	35,232	44,190	41,674	39,525
GALWAY	121,558	130,170	119,093	151,541
WESTPORT	29,081	32,707	37,951	47,411
CLIFDEN	24,405	27,431	21,307	22,349
CONG	24,074	24,142	23,870	24,760
TOTAL	1,631,367	1,585,864	1,695,519	1,758,666



In 2016 Fáilte Ireland executed 1.63m Face to Face Visitor Contacts

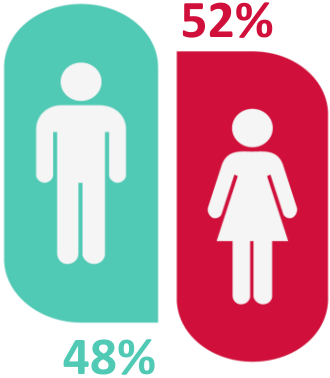
A photograph of a lighthouse situated on a dark, rocky cliffside. The lighthouse is a small, white building with a blue roof and a red-topped tower. The ocean is a deep blue, with white waves crashing against the base of the cliff. The sky is a mix of blue and purple, suggesting dusk or dawn. The overall scene is dramatic and scenic.

2. Understanding the Information Ecosystem

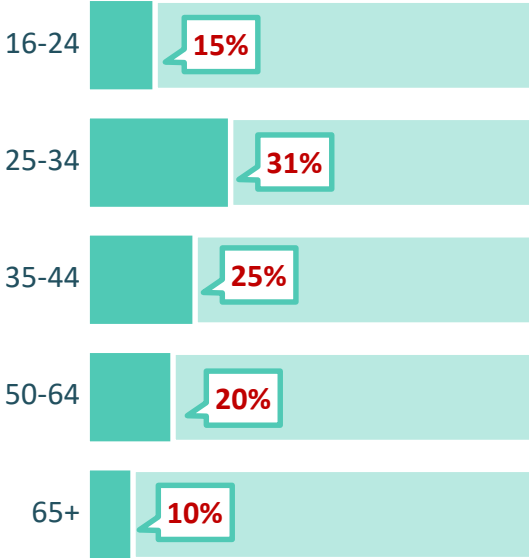
Sample Profile

(Base: All Overseas Holiday Makers - 731)

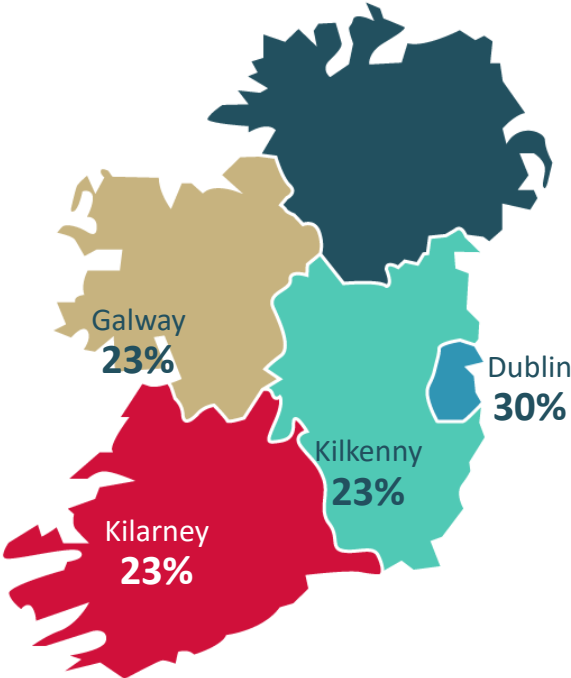
Gender



Age



Location Of Interview

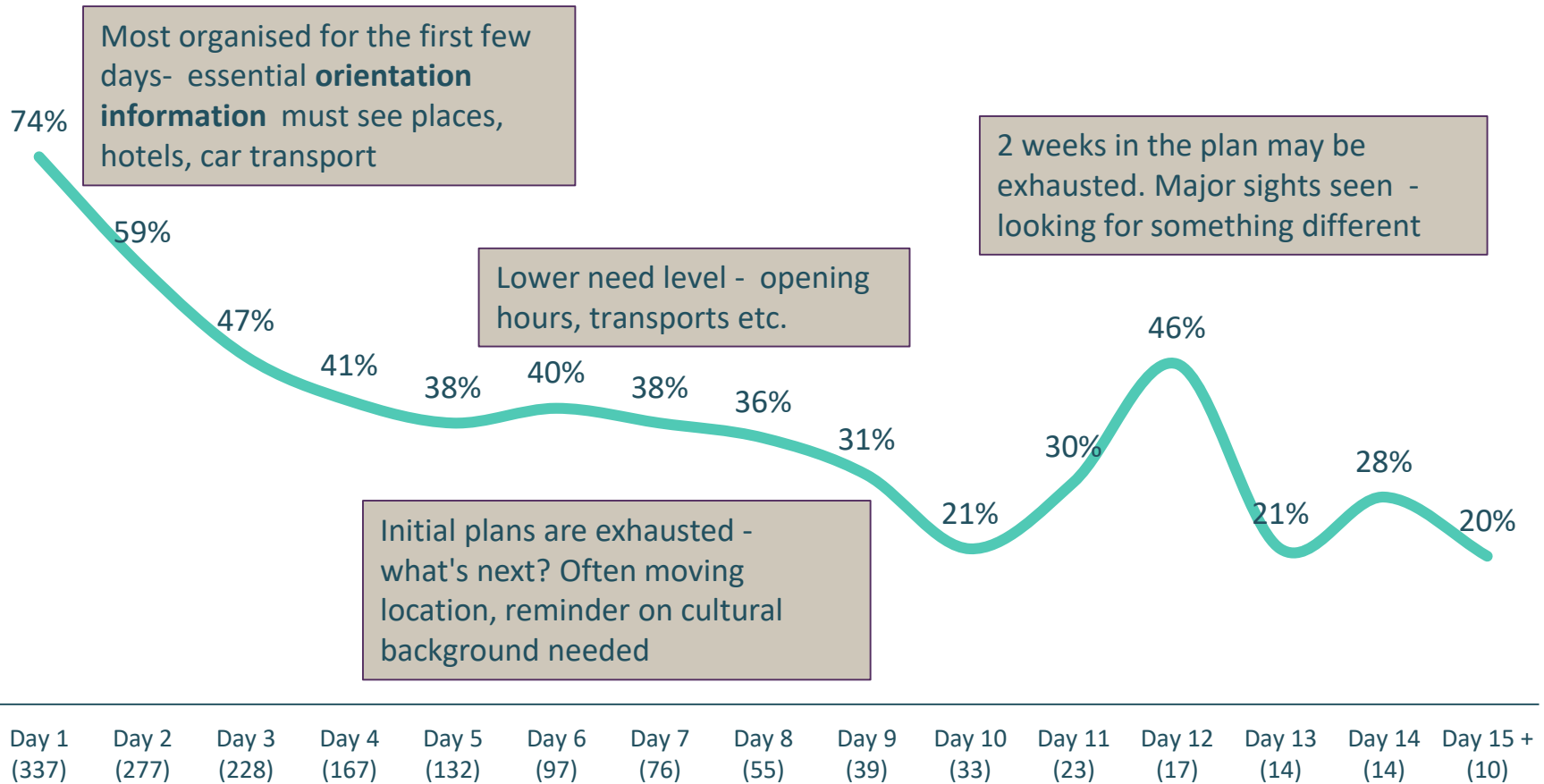


COUNTRY OF RESIDENCE	
USA	25%
Germany	14%
The UK (excl. Northern Ireland)	12%
France	1%
Canada	8%
NET: EUROPE	56%
NET: OUTSIDE EUROPE	44%



Information Search Time Line while in Ireland

(Base: All Overseas Holiday Makers - 731)



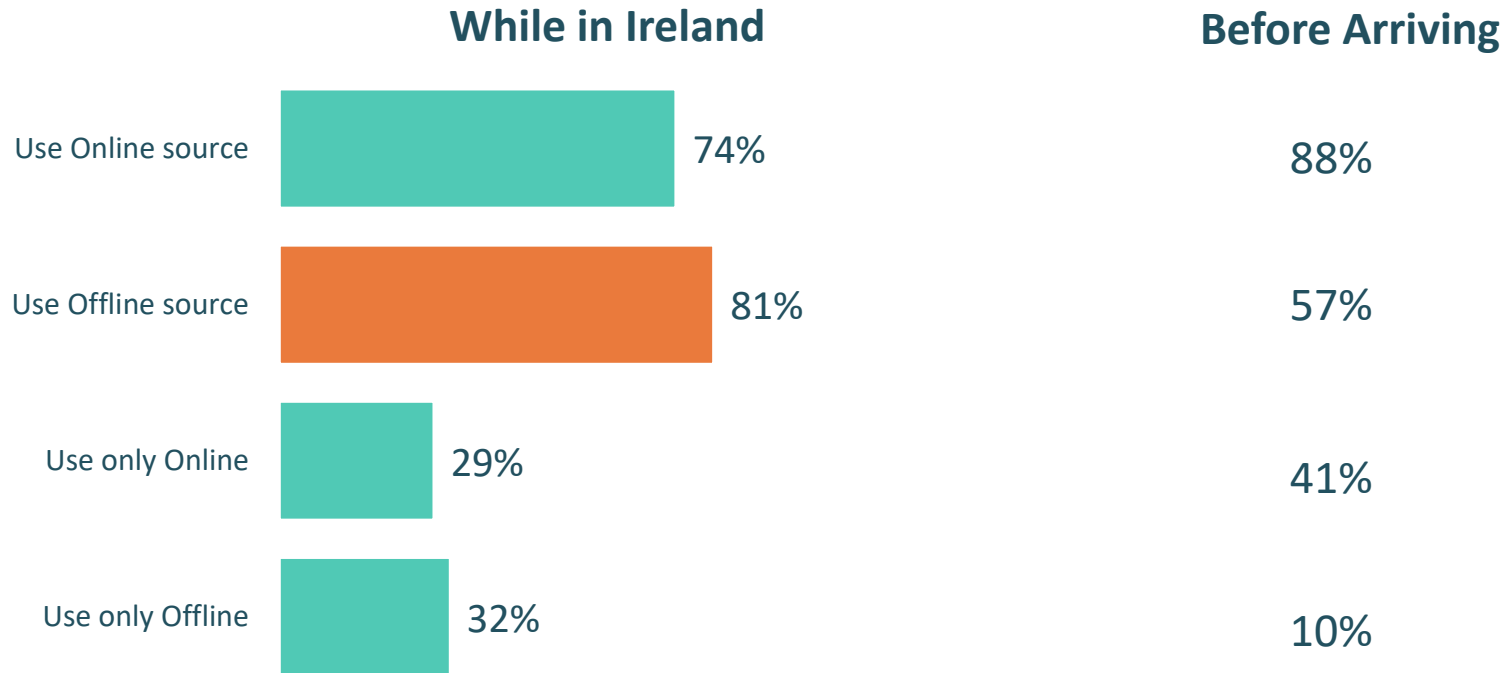
Q.13 At what point of your journey did you look for this information? Please tell me every time you needed to look for tourist information.

Day 1 is the crucial day for orientation information for visitors to Ireland. Information needs gradually falling back after this point, until a final search for information again towards the end of their trip.



How do Tourists Find Visitor Information While they are in Ireland

(Base: All Have / Will Look up Information In Ireland– 409)



Online remains the dominant source of information for visitors in Ireland – but offline methods remain important to visitors while on their trip.

Preferred Source of Visitor Information

(Base: All Overseas Holiday Makers - 731)

43%

Prefer to use

technology

Who?

/ Those aged 35-49 (50%)

"I wouldn't ask a person on the street or in a restaurant in any other country so I suppose I'm out of practice!"

48%

Prefer Both

"I like to be in charge but then again I don't want to go the whole time without talking to the locals"

"you can never know everything you need to know no matter how well you prepare - you'll have to ask for help sometimes"

9%

Prefer to **talk to**
real person

Who?

/ American Visitors – 13%

"people are surprisingly helpful - that's why I came back to Ireland"

While the tide is in favour of technology over people, half of visitors like a combination of both!

REDC

Information Needs at a Glance

(Base: All Overseas Holiday Makers - 731)

99%
Of all overseas visitors looked up information prior to arriving in Ireland



56%
Of overseas visitors have/will look up new information while in Ireland



85%
Of those looking for information have/will visit a Tourist Office*

=

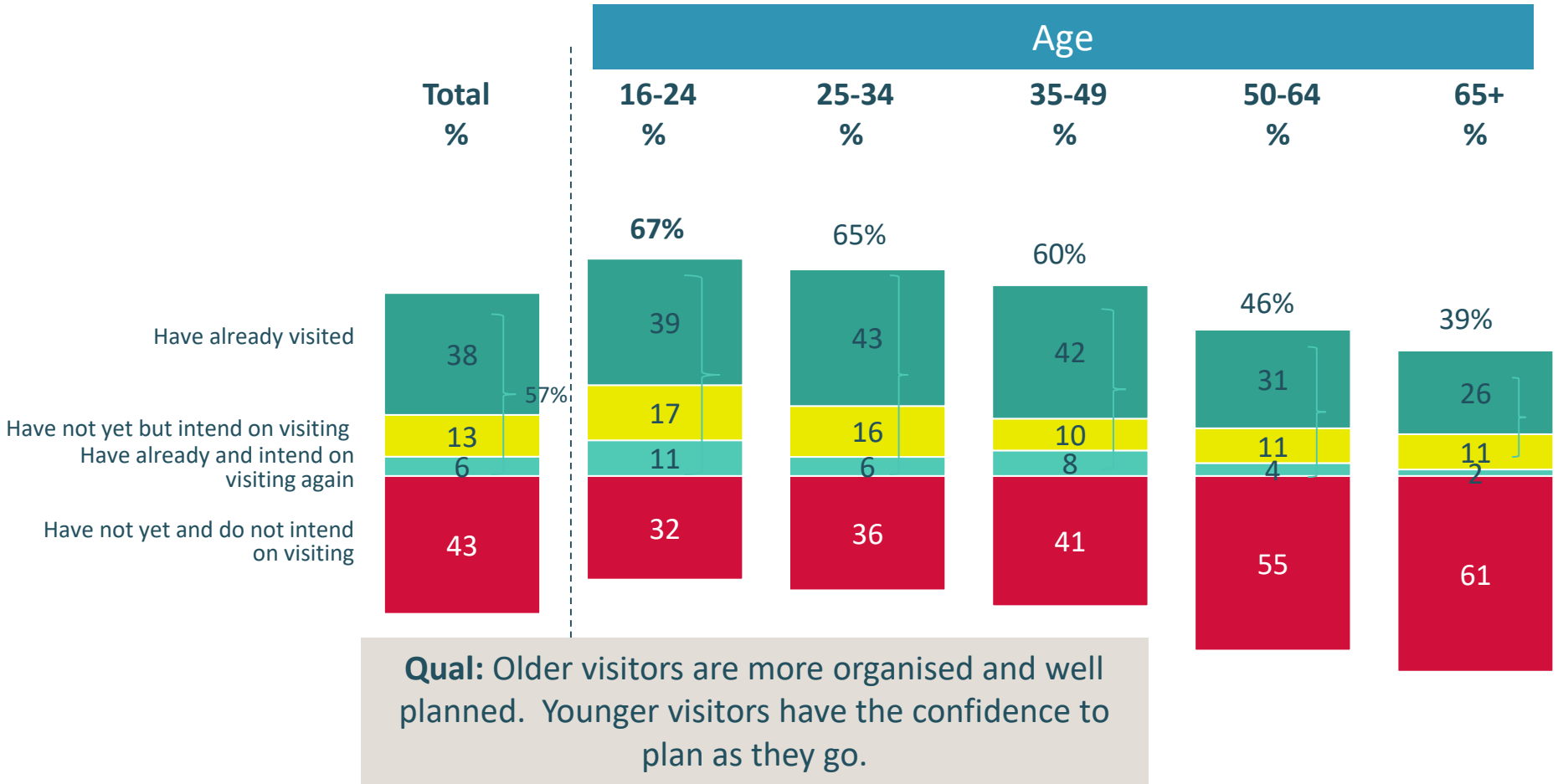
51% of Total Overseas Visitors have/will visit a Tourist Office

51%
Of TOTAL overseas visitors have/will visit a Tourist Office



Incidence of Visiting/Planning To Visit TIO

(Base: All Overseas Holiday Makers - 731)



Key Insights: Younger visitors are more likely to have already visited or plan to visit a TIO – older visitors are less likely as they arrive more prepared.





While there are a large number of findings, here are a few that we found noteworthy:

1. **51%** of Visitor visit or plan on visiting a TIO during their holiday.
2. **Going Mobile** – Over 90% of visitors who looked up information since arriving to Ireland used their own device and nearly 7 in 10 used their own phone. Just 1 in 4 used a device provided by a tourist body.
3. **Information Overload:** Though online sources of information are very important, (88% use before, 74% while in Ireland) visitors frequently find the amount of information overwhelming and need assistance filtering it.
4. **The Human Touch** – While the tide is in favour of technology over people as a preferred source of visitor information, almost half of visitors (48%) prefer a combination of both.
5. **Location, Location, Location** - The TIO is viewed by visitors as a valid and trusted part of the information jigsaw. However, visitors are most open to using TIOs when they are conveniently located.

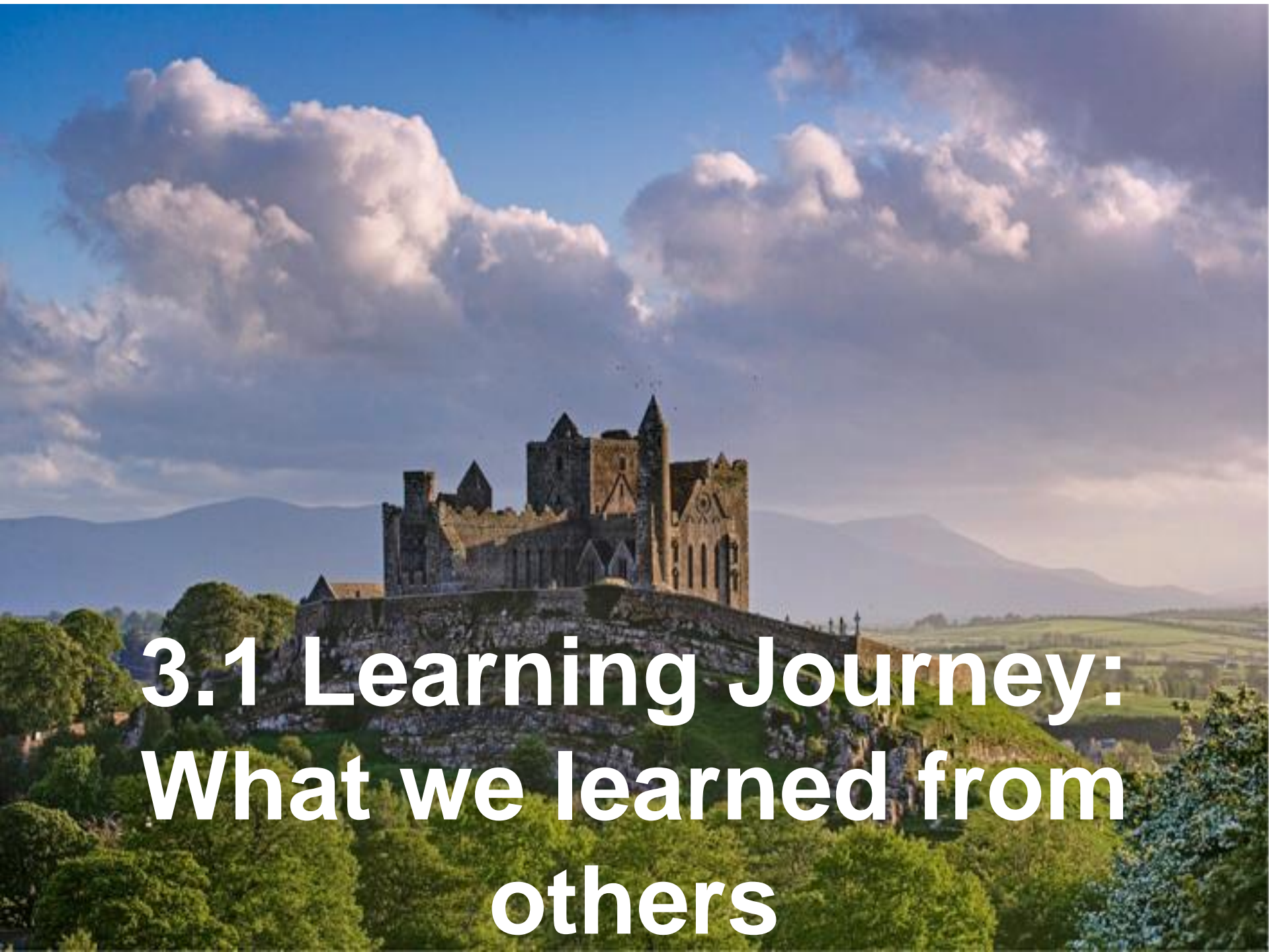
Key Insights Summary



Fáilte Ir
National Tourism Devel



- 6. It's not just the Old(er) Visitor** - Visitors over 50 years tend to undertake more research before arrival in Ireland, as a result, they are less likely to use TIOs (46% for those between 50-64, 39% for the over 65s). In contrast, two-thirds of those under 50 use TIOs.
- 7. Devil in the detail** – Information is sought on opening hours, best time to visit, especially if changing plans. This can be either online or via guide books but they also appreciate personal interaction to give weight to this.
- 8. Map & Pocket Guide** - Visitors still like to use printed maps and pocket guides to give them a flavour of the destination and 'what not to miss'. This is especially true if size allows the visitor to carry it around.
- 9. Where have all the accommodation bookings gone.** General information search is the No 1 search for visitors since arriving to Ireland at (83%) and '**making a booking**' at (71%) with tourist attractions/ sights and things to do topping the list. Only 16% of information looked up related to accommodation bookings (and only 1% using TIOs for this purpose)



3.1 Learning Journey: What we learned from others

Key Learnings

- 1 Consistency is key
- 2 Be clear about what your role is
- 3 Human and Tech not Human vs Tech
- 4 A coherent Network is a huge advantage

Key Learning:

Consistency



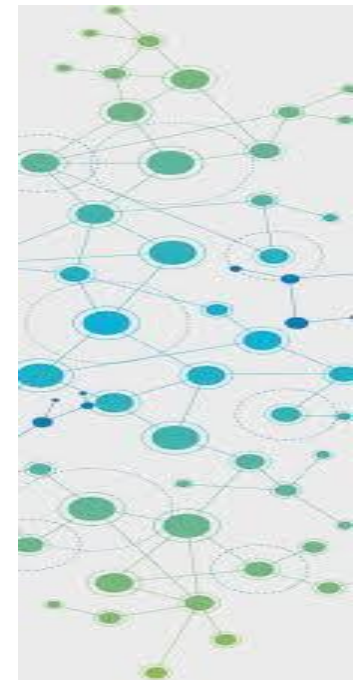
Be Clear



Human & Tech



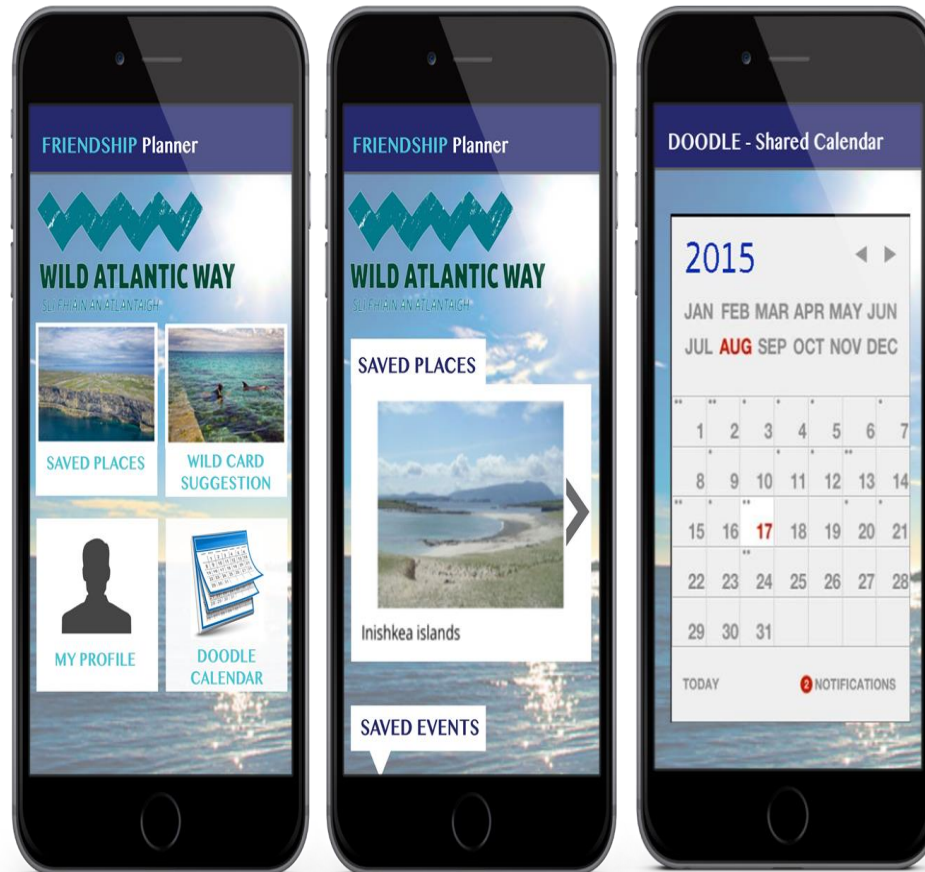
Coherent network



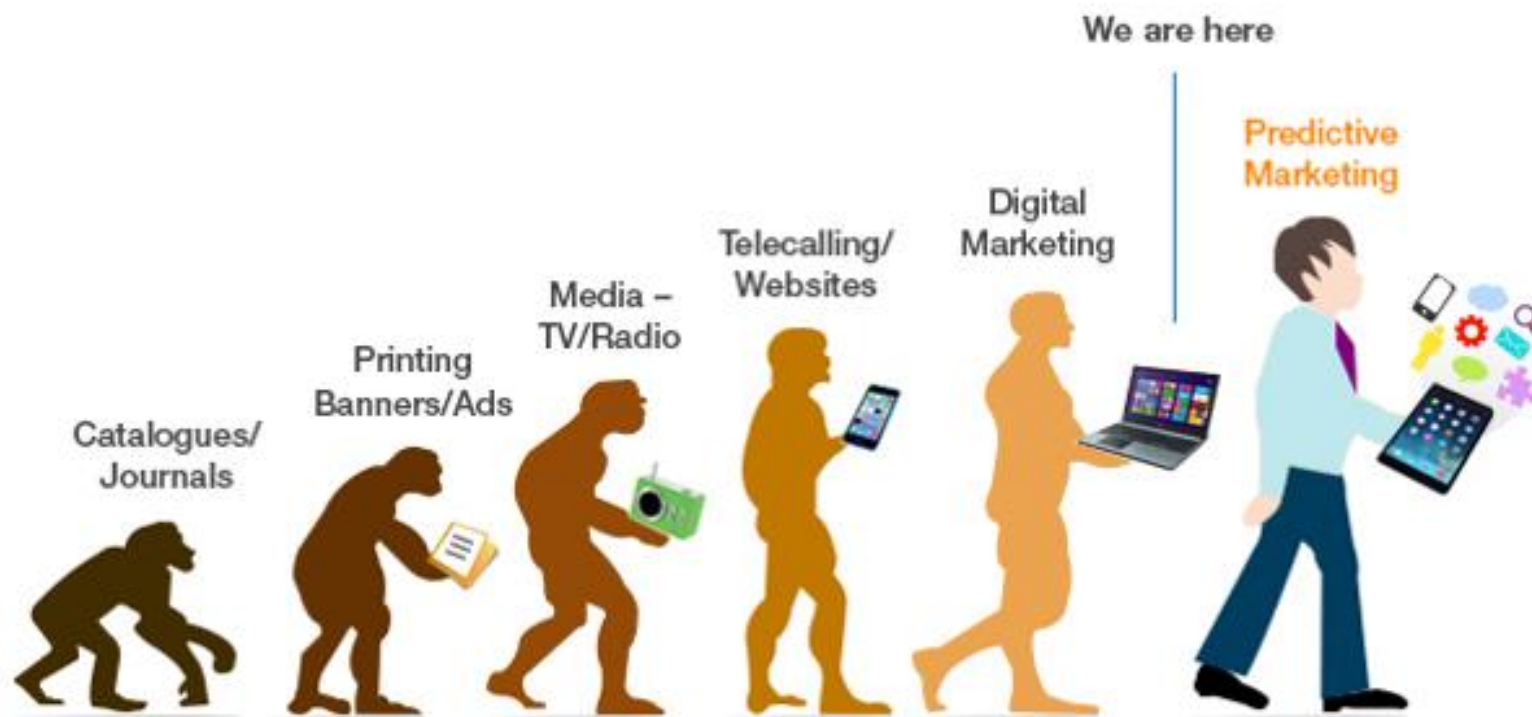
A tall, cylindrical lighthouse with alternating black and white horizontal bands stands on a rocky cliff. The lighthouse has a red railing around the top section. The cliff is dark and rugged, with a small pool of water in the foreground. The ocean is visible in the distance under a blue sky with some clouds.

3.2 Learning Journey: What we learned about Digital Trends

Trend: Mobile



Trend: Personalisation



Visitors seek out products and experiences that are tailored to their tastes and needs.

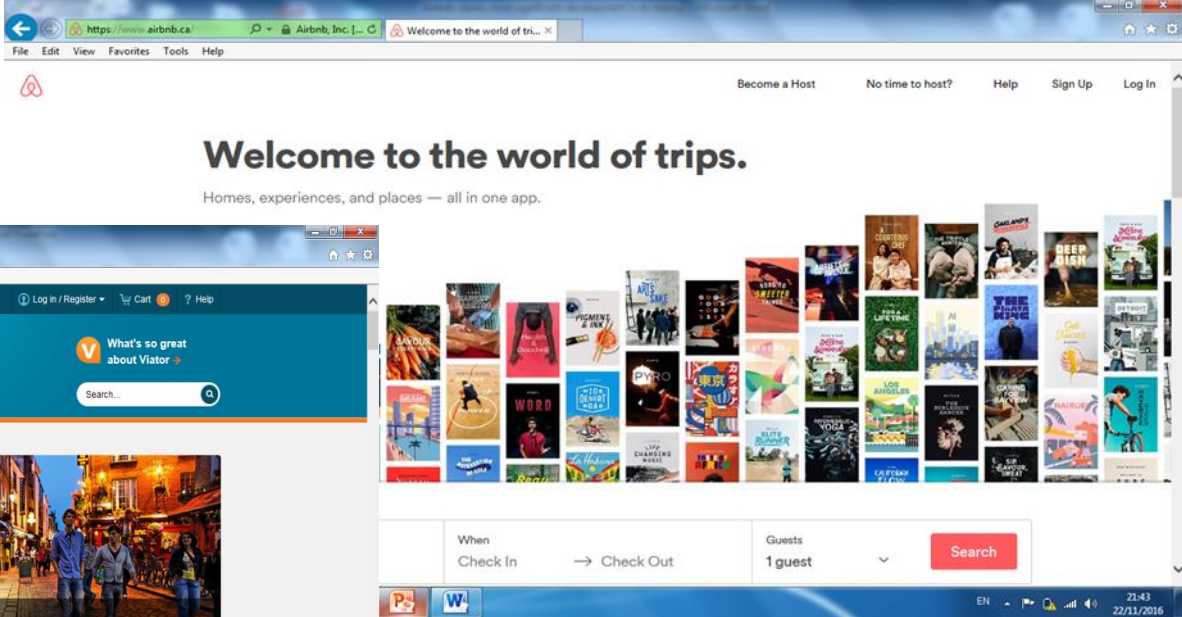


Trend: Local

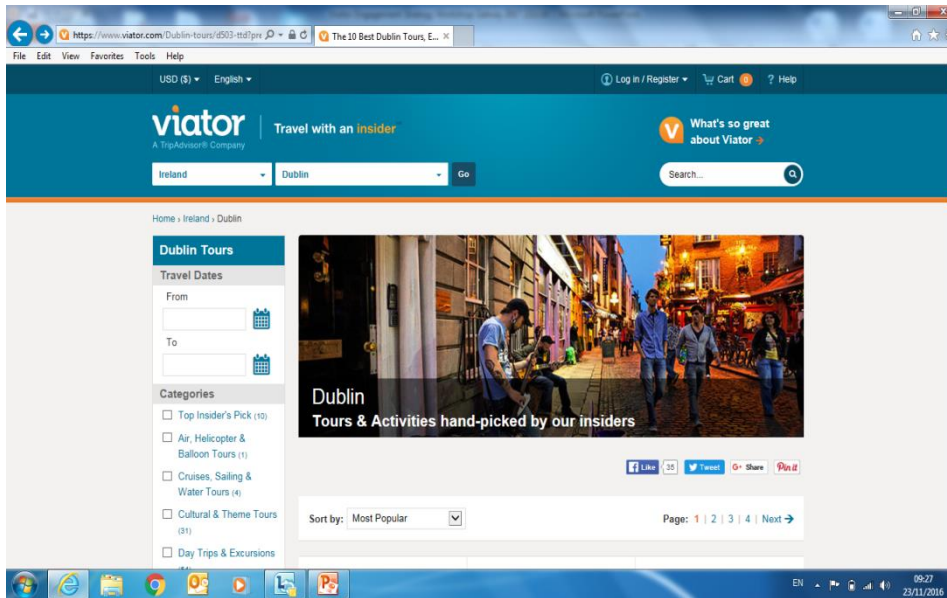
Spotted by Locals



Trend: In-Destination Tours & Activities



A screenshot of the Airbnb website homepage. The browser address bar shows "https://www.airbnb.ca". The page features the Airbnb logo and navigation links: "Become a Host", "No time to host?", "Help", "Sign Up", and "Log In". The main heading reads "Welcome to the world of trips." followed by the tagline "Homes, experiences, and places — all in one app." Below this is a large grid of colorful travel experience cards. At the bottom, there is a search bar with "When" and "Check In" fields, a "Check Out" field, a "Guests" dropdown set to "1 guest", and a red "Search" button.



A screenshot of the Viator website showing search results for "Dublin Tours". The browser address bar shows "https://www.viator.com/Dublin-tours/d503-htd/prv". The page header includes "USD (\$) English", "Log In / Register", "Cart", and "Help". The main navigation bar says "viator Travel with an insider" and "What's so great about Viator". Below the navigation, there are filters for "Ireland" and "Dublin", and a search bar. The main content area features a large image of a street scene in Dublin with the text "Dublin Tours & Activities hand-picked by our insiders". To the left, there are "Travel Dates" fields and a "Categories" list with checkboxes for "Top Insider's Pick (10)", "Air, Helicopter & Balloon Tours (1)", "Cruises, Sailing & Water Tours (4)", "Cultural & Theme Tours (31)", and "Day Trips & Excursions". At the bottom, there is a "Sort by: Most Popular" dropdown and a "Page: 1 | 2 | 3 | 4 | Next" navigation.

Key Takeaways

Technology:

- **Online** has become the driving force to visitor information needs throughout the entire journey
- In **destination personalisation** is in its infancy.
- The **monetisation** of in-holiday service (tours and attractions) remains a challenge

Human Interaction:

- The resurgence of demand for **face to face** personal service i.e. the tech-less or tech-lite holiday.
- Consumers crave **personalisation**. Though mobile penetration is huge, digital personalisation and localisation functionality is still quite crude – but its improving!



3.3. Learning Journey: What we learned about Ourselves



What we discovered!

- 1** TIO network felt disconnected from Fáilte Ireland
- 2** 3 tier structure makes service control very difficult
- 3** The lack of a consistent identity is felt to be very confusing
- 4** There is a lack of differentiation between the official TIO network and private information providers
- 5** The TIO network have been through a period of change and are cautious about further change
- 6** There is a need for greater communication and connectivity throughout the wider network.



4. So What?

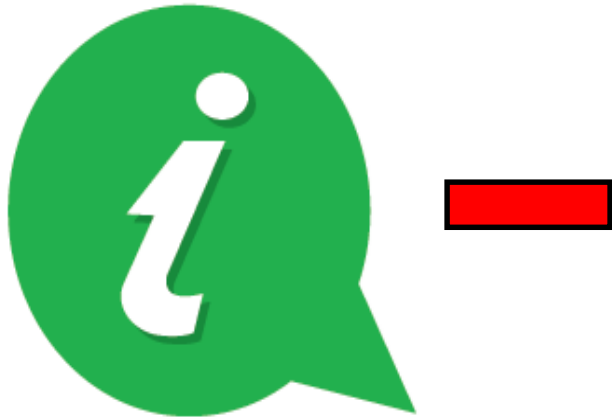
So what?

In context of the evolving information 'ecosystem' the **TIO needs to identify which visitor needs it is best placed to meet** using its people, technology and a combination of both.



- In-Destination Service
- Human Interaction
- Customised Advise
- Trusted Local Knowledge
- Plan first, then book
- Central Locations

Official Tourist Office Shortcomings



- No service before Trip
- Service restricted to fixed locations
- Service restricted to fixed times
- Not scalable



5. Our response

We developed a new guiding PURPOSE 'Our north star'

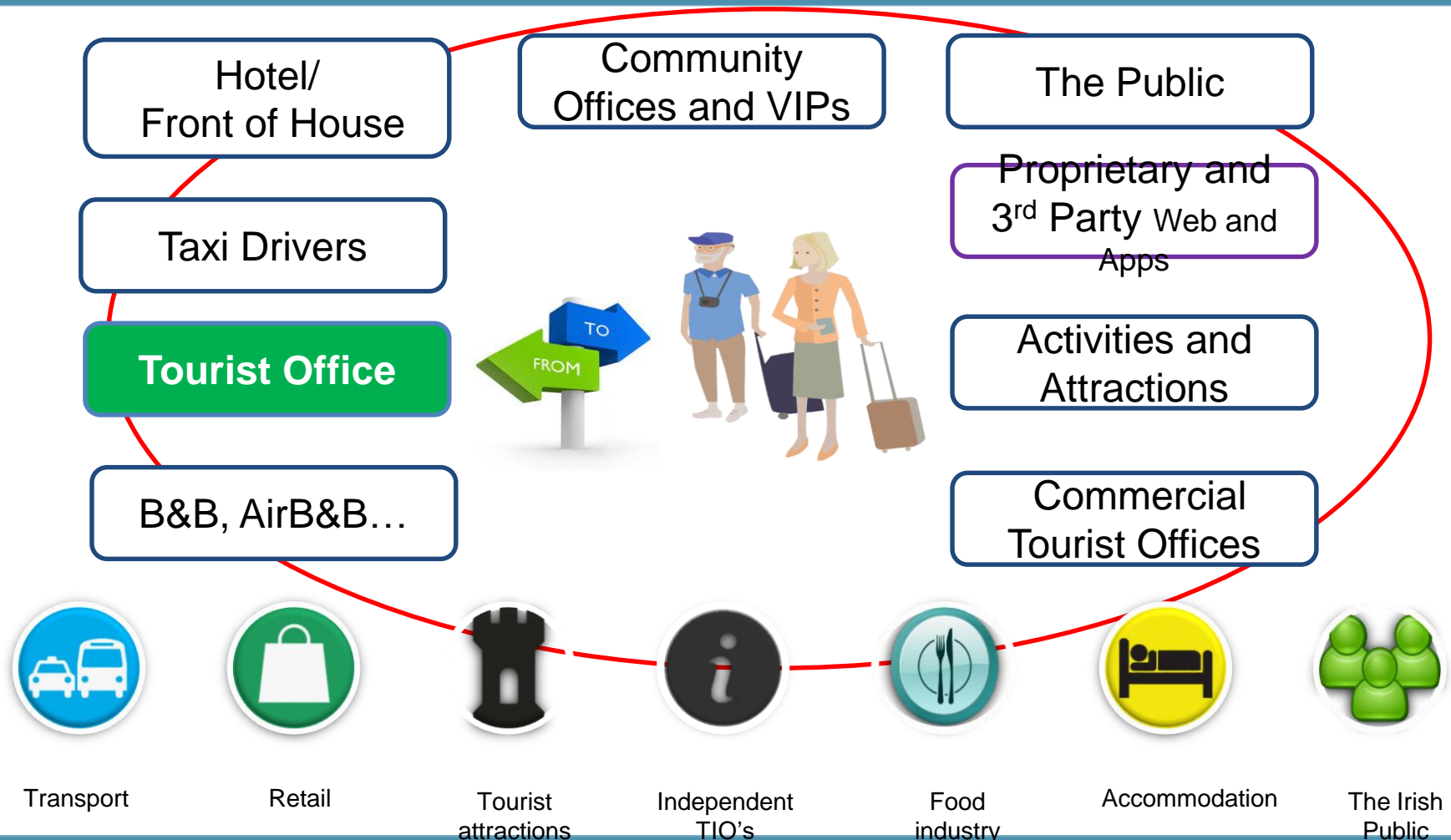


Fáilte Ireland
National Tourism Development Authority

To facilitate visitors to have the holiday
of a lifetime in Ireland

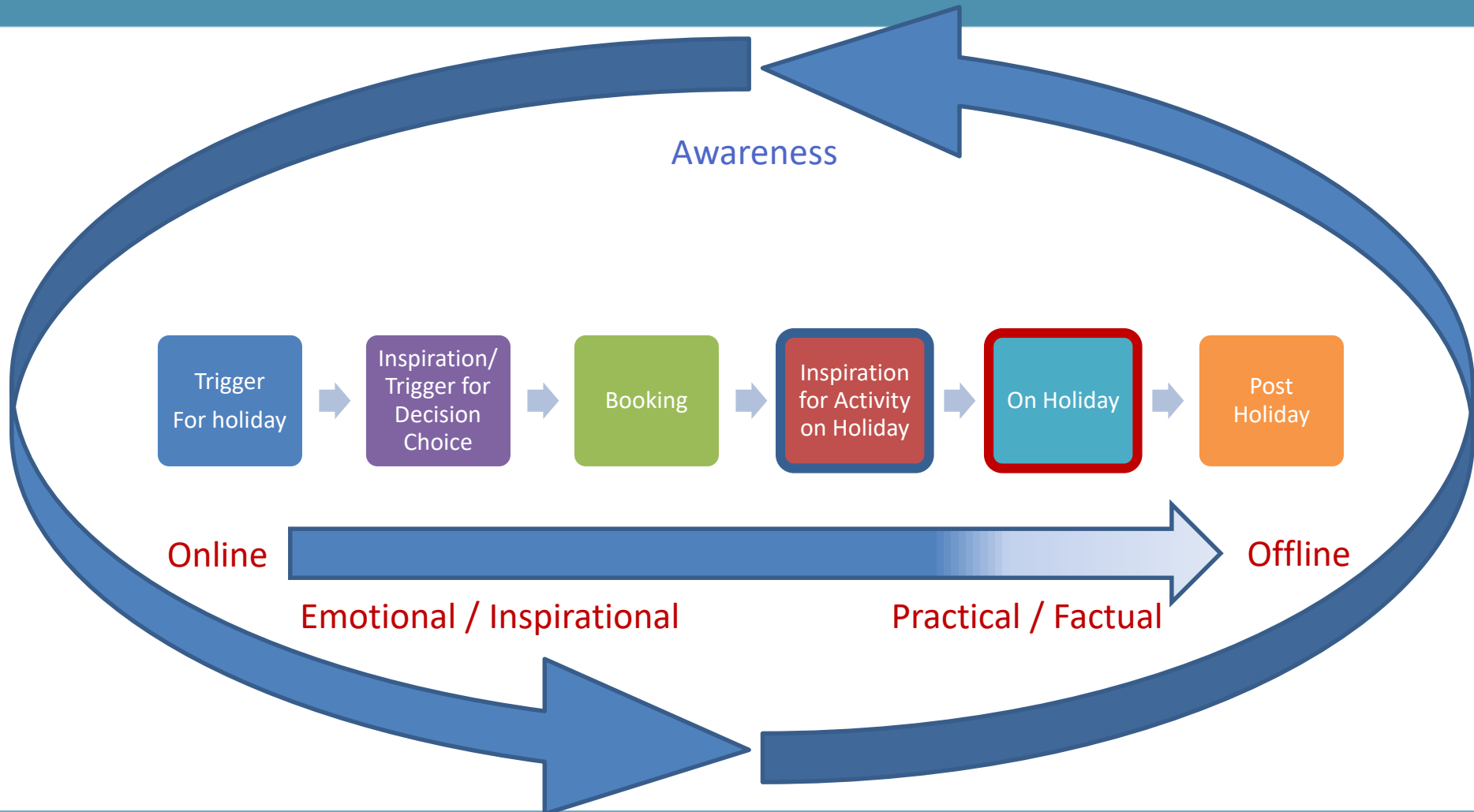
...by making it **easy** for visitors to overcome the
'what to do' problem.

We've widened our lens



Key Insight: Consumers use channels situationally, not exclusively. To expand our reach & influence we must engage visitors on-their-terms across multiple touchpoints.

We lengthened our view



6. What does that look like on a Monday morning?



Nine Strategic Bundles

Cx / Service Provision

Education & Training

Network Management
& Administration

Accreditation and
Standards

Design & Branding

Digital & Tech
Strategy

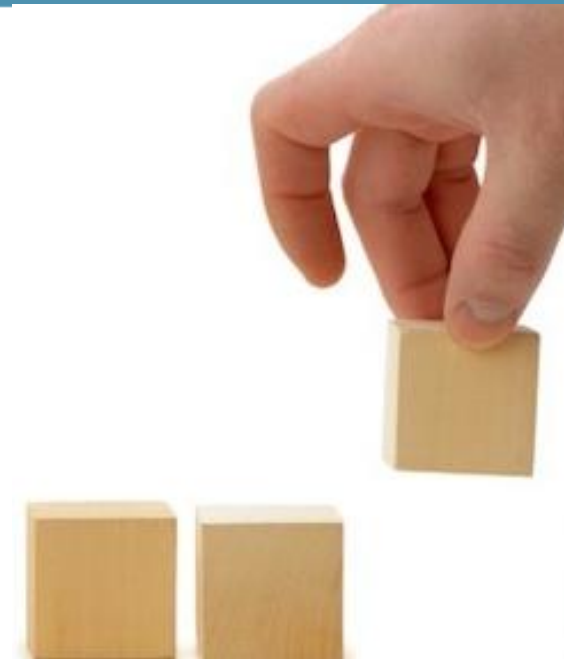
Research and
Measurement

TIO Programme
Integration

Print (Guide and
Maps)

Strategic Cohesion

Develop a consistent service across our 3 tiered network



Cx / Service Provision

Education & Training

Network Standards
and Management

Putting our people at the centre of the in-office experience



Fáilte Ireland
National Tourism Development Authority



Cx / Service Provision

Putting our people at the centre of the in-office experience



Fáilte Ireland
National Tourism Development Authority



01. Exterior Facade

02. Feature Wall

03. Local Attractions

04. Local Events

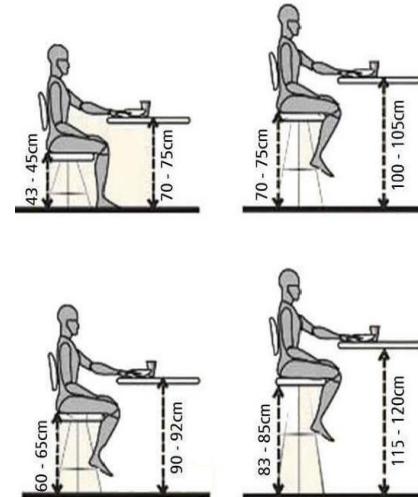
05. Visitor Bench

Cx / Service Provision

Putting our people at the centre of the in-office experience



Fáilte Ireland
National Tourism Development Authority



Cx / Service Provision

Create a consistent brand



visit
Dublin



Design & Branding

Create a consistent brand



Design & Branding

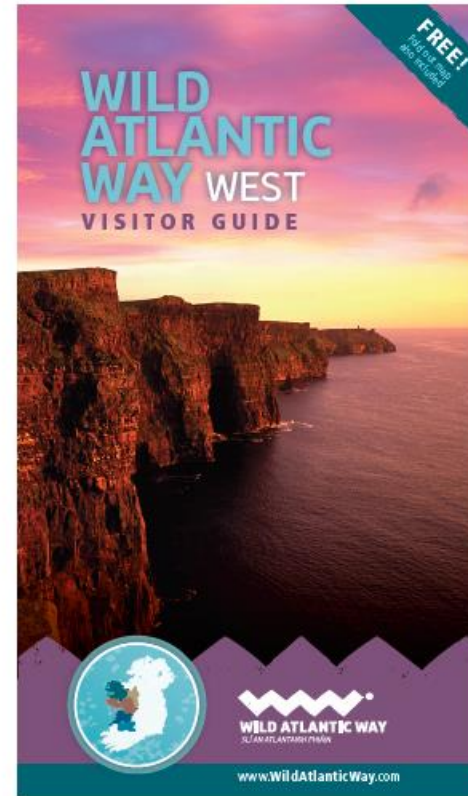
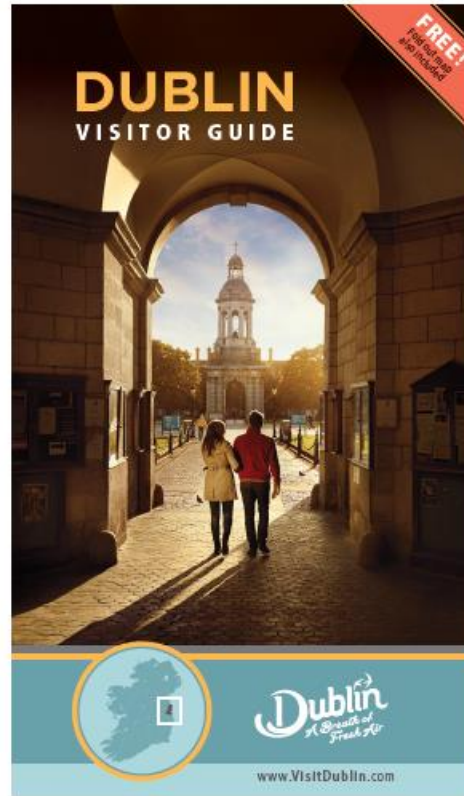
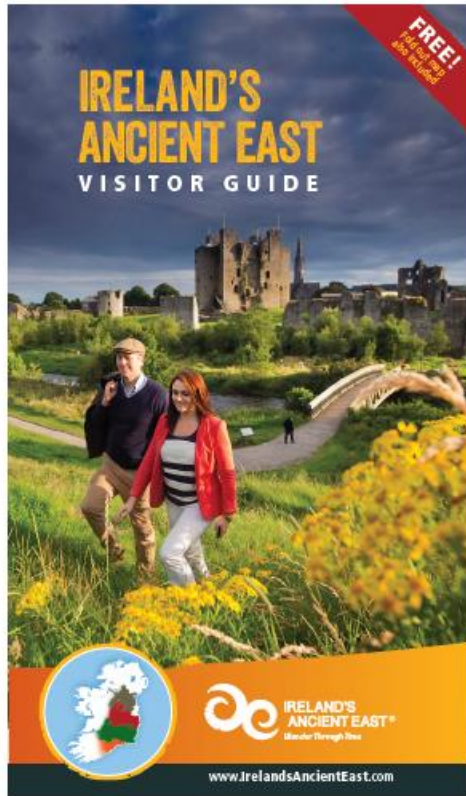
Develop a digital information offering that works through the visitor journey



TIO Programme
Integration

Digital & Tech
Strategy

Produce a uniform print portfolio



TIO Programme Print (Guide and
Integration
Maps)

Develop Key Insights and KPIs/Metrics

Internal

- Visitors per office
- Cost per Visitor
- Literature distributed
- Sales / Sales Growth
- Shared Departmental KPI's

External

- Incremental financial impact of TIO's
- Place in the evolving information ecosystem
- Customer Satisfaction

Research and
Measurement

7. Summary



In Summary: Our Change Journey

2016

2017 ...

From: (Visitor Engagement 2017):

To: (Visitor Engagement 2018...)

Organisational Silo

Fully Integrated Value Proposition

Bricks and Mortar Perspective

Ecosystem Perspective

In Destination Focus

Through the Visitor Journey

Information Focus

Travel Planning / Personalisation Focus

Multiple Identities

Consistent Differentiated Identity

Loose Network

Coherent expanded Network



Thank You

Spatial Spread of Tourist Offices

27 TIOs, 39 CTO's, 74 VIPs

FI OFFICES	CTOs	VIPs	VIPs
O'CONNELL STREET	Dun Laoghaire	Athy	Clones
T2	Drogheda	Banagher	Clonmacnoise
SUFFOLK STREET	Dundalk	Bray	Crookstown
Writers Museum	Kildare	Carrickmacross	Fore
ATHLONE	Longford	Clonasee	Kells
WICKLOW	Portlaoise	Cashel Heritage	Kildorrey
MULLINGAR	Carlow	Bru Boru	Kilfinane
CAVAN	Clonmel	Ballon	Kilmallock
KILKENNY	Dungarvan	Enniscorthy	Gorey
WATERFORD	Hook Peninsula	Carrick on Suir	Leighlingbridge
WEXFORD	Cobh	Gorey	Lismore
CAHIR	Shannon A	Arigna	Rathroghan
CORK CITY	Claremorris	Ballinrobe	Spiddal
GALWAY	Maam	Castlebar	Swinford
ARAN	Glen of Aherlow	Gort Burren Lowlands	Tourmakeady
LIMERICK	Youghal	Kylemore	Adare
ENNIS	Middleton	Loughrea	Askeaton
CLIFDEN	Fermoy	Louisburgh	Ballyvaughan
CONG	Mallow	Portumna	Carrigaholt
DONEGAL	Slane	Ardara	Kilbaha
SLIGO	Trim	Burtonport	Falcarragh
WESTPORT	Birr	Downings	Glencolmcille
LETTERKENNY	Arklow	Ballinskellig	Caherciveen
CLONAKILTY	Carlingford	Ballybunion	Glenbeigh
DINGLE	Ballina	Ballydehob	Macroom
KILLARNEY	Ballyshannon	Bandon	Kilfenora
KINSALE	Blacklion	Kildare Village	Lisdoonvarna
TRALEE	Buncrana	Monaghan	Lissycasey
KENMARE	Belmullet	Navan	Miltown Malbay
	Bantry	Newgrange	Malin Head
	Blarney	Oldcastle	Stranorlar
	Valentia	Lough Gur	Sneem
	Skibbereen	New Ross	Tarbert Bridewell
	Listowel	Rostellan	Waterville
	Bundoran	Thurles	
	Carrick On S	Upperchurch	
	Dungloe	Doolin	
	Tubbercurry	Doonbeg	
	Newport	Foynes	

