

OUTDOOR TOURISM MARKETING PROJECT

WORKING PAPER 2 REGIONAL AND NATIONAL MARKETING

This working paper was produced for the Outdoor Tourism Marketing Project. This paper outlines our observations and insights regarding regional and national marketing activities gained from stakeholders and documents that we have consulted. It informs our thinking on how outdoor tourism within the project areas might be marketed in future.

WALES

Current national marketing of outdoor/adventure

Visit Wales creates opportunities to link to and highlight product via rich content on VW websites, annual campaign brochure (theme in 2012 was the coastal path), PR and advertising. VW creates the awareness & desire and aims to get visitors close to purchase as quick as possible. Previously there was a separate outdoor campaign but it has been integrated due to resources. A new role (Service Provider) is about to be appointed who will coordinate content for outdoor tourism (as well as other sectors).

Activities are promoted via [Visit Wales](#) and a separate site for [mountain biking](#). The VW website links to lots of other outdoor related websites. The search for providers is difficult via some links embedded within content (eg the database link for rock climbing, abseiling and mountaineering operators didn't have any contact details at all) but Activity Finder for specific areas is very useful – a search on 'Snowdonia Mountains and Coast' resulted in 205 activity providers that could be searched further by area and / or activity type.

The 'Outdoor Activity Group', organised by the Development Team at VW provides feedback, an outdoor steer and knowledge into Visit Wales – Chris Wright from Snowdonia Active sits on the group from North Wales. VW also attends the North Wales Tourism Partnership meetings.

Outdoor events are also included in the [Wales Events](#) website.

[Showmewales mobile site](#) pulls in simple 'what's on' information.

Visit Wales view of outdoor tourism offer in Conwy/Gwynedd

Gill Berntsen, Head of Tourism Marketing, Visit Wales considers the outdoor tourism product to be very good, although from recent research Wales may not be as strong as previously thought compared to other destinations like Fort William and Cumbria. Gill believes that from a national Wales perspective the outdoor dabbler market is not where the best prospects lie, but it is still seen as important at the local/regional level. Walking clearly dominates; for example when a walking campaign ran recently it created more interest than the main destination Wales campaign.

North Wales Tourism Partnership (NWTP)

Vision for Tourism in North Wales: *“One of the top 5 UK tourism destinations, internationally known for its natural beauty, dramatic scenery, heritage and distinctive culture. A place you can boast about visiting, easy to get to but rewardingly different. **A centre of excellence for adventure sports and the market leader for activity tourism of all sorts.** Plenty going on at all times of the year, whatever the weather, with a lively, living culture and thriving arts scene. A place that is often talked about and features in the media for the quality of its food, hospitality and interesting places to stay. A region that is proud of its heritage and culture, cares for its natural assets and welcomes visitors.”*

[Adventure North Wales](#) website (set up with 18 months funding from NWTP, now run by private business, Cinnamon Active) identifies dabbler products and promotes activity adventure breaks and events in North Wales. Special offers and activity [packages](#) are sold online and a variety of outdoor activity [courses](#) are promoted. Destination North Wales [website](#) focuses on 4 main areas: outdoor products, food, events and accommodation including links to providers across North Wales.

New branding for Tourism Outdoors Wales commissioned by NWTP is being developed (Pearl Fisher) and due to complete in November. The draft strapline is 'at the **heart** of adventure' and aims to communicate the pioneering, proximity and passion of the outdoors offer in North Wales. It is hoped that some 200 businesses will adopt the brand, and it is envisaged that the Destination North Wales site will be rebranded accordingly. WV supports and will also point to this new branding. There are however concerns regarding future limited funding for a promotional campaign for activity tourism which will exploit the new branding.

Conwy & Gwynedd Marketing

From the Visit Wales site there is a link to 'Snowdonia Mountains and Coast' website and brochure. Snowdonia Mountains and Coast is one of the marketing areas designated by Visit Wales and includes the Llŷn Peninsula, Snowdonia National Park and Cambrian Coastline.

The website and brochure are managed and distributed by the tourism officer in the Economy and Community Department, Gwynedd Council in Caernarfon.

Other websites promoting specific areas or collections of similar businesses include:

- ▶ Llandudno website includes Betws-y-Coed and Conwy
- ▶ Outdoor attractions are included in the [North Wales Attractions website](#).
- ▶ The Countryside Council for Wales [website](#) provides an online outdoor map although not very consumer friendly.

The 3 national outdoors centres all promote and sell product separately online:

- ▶ [Plas y Brenin](#) offers outdoor activity training, residential courses, holidays and expeditions – bookable online.
- ▶ Plas Menai, the [National Watersports](#) Centre offers RYA training courses in dinghy sailing, windsurfing, powerboating, cruising, kayaking courses and sea kayak expeditions.
- ▶ The National White Water [Centre](#) at Canolfan Dwr Gwyn Genedlaethol is unique in UK. Bookable online

Other individual businesses sell online eg [Tree Top Adventures](#) and [Adventure North Wales](#) sells packages.

Opportunities for Gwynedd & Conwy

According to Visit Wales outdoor activity is a growth sector and the key to grabbing this opportunity is to make it easy for visitors and accessible to the mass market. Businesses and tourism organisations must think of ways to get the visitor closer to purchase. The challenge lies with communicating the products to the consumer, defining product packages for the different markets.

A proactive business sector working together is seen as essential to provide a competitive outdoor offering. Collaborative working is needed, with Local Authorities via the newly formed Economic Ambition Board which aims to pull together the 6 current areas in North Wales. 6 DMO partnerships have been requested to include outdoor tourism on their meeting agendas. Sean Taylor for Conwy and Chris Wright for Gwynedd are representatives for outdoor tourism

Online booking engine – 'itry' was piloted but some think is not the right model, others believe that it should have been given more time to become established. The Cinnamon run site, Adventure North Wales has potential to develop according to NWTP.

As well as an online booking system, the North Wales Outdoor Tourism branding is seen as a real opportunity to promote to dabbler market. Mobile information and a booking platform will also be important for the increasingly mobile population.

[Share Wales](#) is an initiative that outdoor businesses can tap into by tagging and sharing content including images and video direct to the web via Visit Wales and its new Service Provider who will consider inclusion (if relevant) in PR, campaign magazine, website and other advertising. The aim is to promote Wales via a network of images and social media sites.

IRELAND

National Websites

[Tourism Ireland's](#) site for international markets has a number of tabs to entice or inform the visitor and these include 'About Ireland', 'Things to See & Do' and 'Plan your Visit'. The home page also has a 'hot offers' section with flight deals etc.

Within 'About Ireland' there are sub sections for 'Ireland's Landscape', 'History & Heritage', 'People & Culture', 'Cities' and 'Experience Ireland'. Currently on the home page of the 'About Ireland' section is a feature on Wonderful Walks, unfortunately the link for further details on the walks was not working. If you follow a different route in, through the Activities tab a selection of 28 routes are detailed and split into regional sections.

In the 'Things to See & Do' section there is an Activities option with a drop down menu with a range of activities including cycling, walking, equestrian, fishing, water-based and inland cruising. The cycling section offers a bit of editorial and advises visitors to call for a free Cycling in Ireland guide. There are a number of listings of routes etc, but they are just listed randomly so visitors would need to scroll through them or sort them to identify what they are offering and where they are.

These listings of operators and products come from a 'listings' tab, where you can search by region, county, type of activity etc. Although this resource is not highlighted enough this is a fairly useful tool to search by area or by product.

The editorial for each activity section is not very informative. There is some detail on where to do the activity, but not a huge amount and this could be improved.

In the 'Places to Go' tab, you are offered further choices of counties, areas and cities. Visiting the Kilkenny section there is a brief overview of the county and a choice to click on a highlights section. There is a poor selection of highlights on offer but it mentions fishing on the Nore and the Graiguenemanagh Regatta. The Kildare section is much the same in the quality of information but with more highlights on offer with the National Stud etc. The highlights section details that there are over 75 miles of canals ideal for walking along them. The Dublin section promotes Dún Laoghaire and the coastline. The Pier Walks are mentioned in the Highlights section.

Links exist to the local sites for [Kildare](#), [Kilkenny](#) and [Dublin](#). The Kildare link might be better linking to the [tourism](#) site rather than this community site and for Dublin to [Visit Dublin](#) rather than to the Dublin City Council site. The Visit Dublin site has a specific page for [Dun Laoghaire](#) which details what to see and do, including water sports and walking.

Within the 'Places to Go' section there are sample itineraries throughout Ireland and there could be scope to include details on activities in some new routes for the project areas.

Tourism Ireland is [on twitter](#) with 4,337 followers and they appear to tweet regularly. Their [Facebook](#) page has 144,000 likes so they must be doing something good. Both of these provide an opportunity to raise awareness of outdoor activities.

Fáilte Ireland's [site](#) for the domestic market currently has a decent spread of features on the home page including walking festivals, Trails Day, golf and surfing. Autumn/winter offers, spas, festivals and food are also featured. Trails Day links to a specific site which focuses on 7 October being a day to celebrate Ireland's Trails and includes a canal walk in Athy, guided canoe trip in Graiguenemanagh and hike and bike opportunities. Dublin Mountain Partnership events are also included.

This site has a 'Places to Go' section which then links to the various counties but with just a small amount of introductory editorial. In the 'What to Do' section you can link through to Activities and Adventures where there is a choice of On the Water, Looped Walks, Horse Riding and Wave Riding. Operators are listed for each area and you can search by product in each area, so if you wish to go fishing in Kildare you can search accordingly. Water sports is not an option, although cruising is and this is a missed opportunity.

There are no links to regional sites from this site. There is a presence on [twitter](#) with 3,162 followers with a few tweets each day. They are also on [facebook](#) with 22,000 likes and recent activity. Both provide good opportunities to raise awareness.

Regional websites

The [Kildare](#) tourism site has links from the home page for further details on activities. This includes details of towpath trails along the canals and rivers. There is also some good information on golf with the offer of a golf guide. Although boat trips are offered as an option there are no details to be found within this section. There are no twitter or Facebook links promoted on the site.

The [Dublin Dún Laoghaire](#) site offers you the options of walking and sports and leisure. Water sports can be found in the sports and leisure section. Given the importance of the coast then it should perhaps be higher up the site structure. Swimming outdoors is also listed with Sandycove and Forty Foot mentioned. On the home page of this site there is a feature on the Insider's Guide to Dublin's southern coastal towns and villages which is a useful overview on what is on offer. DLR tourism has a [twitter](#) presence with only 63 followers and the last tweet was in August, and also a [Facebook](#) page with 1,600 likes and the last activity was a fortnight ago.

There is the local DLR council [site](#) which has a 'visiting' section. The 'Things to Do' section has features on the range of activities on offer including walking, watersports, rock climbing and swimming. These sections contain further details but do not provide comprehensive listings of who offers what. There are no twitter or facebook links promoted on the site.

On the [Kilkenny](#) site there is a 'Things to See & Do' section. From an activity point of view walking is really the only activity mentioned. There is however a specific 'Sport Activities' tab which contains the usual suspects of adventure, white water, cycling etc. The choice of walks detailed from this section on the site is poor. There is a [wet 'n' wild](#) feature on the home page of the site which leads you to details of activities on the river including stand up paddleboarding and kayaking. There is also a home page feature titled [Outdoor Enthusiasts and Adrenaline Junkies](#) which links to a fact sheet which contains a good overview of the product on offer, including some walks, and is more useful than the listings they provide elsewhere. They also have a downloadable [leaflet](#) titled family fun which details top ten things to do and also includes rainy day suggestions. This site could probably do with a bit of work on the structure and priority messages but it contains some good details. There are no twitter or Facebook links on the site.

Marketing Campaigns

Tourism Ireland delivers a number of marketing campaigns to attract overseas visitors to Ireland. Fáilte Ireland is responsible for encouraging the domestic market to holiday at home.

Great Britain

According to the TI website, Great Britain is the largest single source market for visitors to the island of Ireland. It provides almost 54% of visitors to the island of Ireland (48% of visitors to the South and 70% to Northern Ireland). In 2008, it delivered a total of €1.6bn/£1.12bn in overseas tourism revenue and 4.65 million visitors. Touring, city breaks and countryside holidays are among the most common holiday

choices – this makes the island of Ireland an ideal destination.

Tourism Ireland undertakes a wide range of promotional activities in the marketplace focusing on their best prospects who are known as sightseers and culture seekers. The key objective of their campaigns in the GB market is to give the consumer plenty of reasons to visit, show how easy it is to get there by air and sea and what great offers are available and to emphasise that now is the time to travel. Visits from Great Britain are year round, as with other markets, they peak in the months of July and August.

Some highlights in Great Britain for the first half of 2012:

- ▶ Almost 20 million British people will see 'Jump into Ireland' TV ads this year
- ▶ More than 6 million will see their cinema ads
- ▶ 14 million will see their outdoor campaign
- ▶ Their Diaspora campaign will target the 6 million Britons who claim Irish descent and encourage them to 'come home'
- ▶ Golf, business tourism, e-marketing and social media activities, promotions like the 'Best of Britain & Ireland' and a series of sales blitzes across Great Britain are keeping the island of Ireland front of mind for potential travellers
- ▶ Positive publicity of at least €70 million will be generated by Tourism Ireland in Great Britain this year

Tourism Ireland's new 'Jump into Ireland' advertising campaign kicked off in Britain in January. The TV campaign – which will reach almost 20 million potential British holidaymakers this year, on a mix of channels which include ITV, Channel 4, Channel 5, Sky 1 and satellite channels – conveys a sense of playfulness and reflects the immersive nature of a holiday here with iconic experiences and warm, friendly people. One version of the ad shows visitors cycling.

Tourism Ireland will place particular focus this year on highlighting The Gathering 2013 to those people in Great Britain who feel linked by family, friends or otherwise to Ireland

Regional touring and longer-stay holidays are a major focus in Great Britain again this year. Tourism Ireland is highlighting the kind of iconic experiences available across the island, which differentiates Ireland from domestic holidays in Great Britain. Research confirms that visitors who visit by car, or who hire one while there, tend to stay longer and spend more. Tourism Ireland also undertake campaigns promoting great value city breaks.

Co-operative marketing with airlines and sea carriers is also a vital element of their promotional activity. Investment in co-operative promotional campaigns with air and sea carriers helps drive demand for routes to a wide range of national and regional airports and ferry ports.

The **GB Path to Growth** strategy was launched in October and details how Ireland is going to restore growth to its biggest market. This report mentions that four experience types have been identified that are highly motivating for potential holidaymakers: Vibe of the City, Living Historical Stories, Awakening the Senses and Getting Active in Nature.

The report refers to research which states that the island of Ireland is not seen as 'best at'; the different motivating factors; people go somewhere else. There is therefore a need for the product development strategy to focus on specific and compelling experiences that match the needs, interests and motivations of the key segments. The report states that there is now a need to create and promote 'hero' or iconic experiences that can only be had on the island of Ireland turning it into a must visit destination.

This includes details on new segmentation focusing on Social Energisers, the Culturally Curious and, currently less of a priority at the moment, the Great Escapers. The Culturally Curious are not relevant to the outdoors tourism project.

Social Energisers are young couples/adult groups looking for excitement, new experiences and fun; social holidays in somewhere new and different. This segment offers the best immediate opportunity as the main element of what they want, the city experience, already exists. They can get involved in what there is on offer in the city and also close by. They want action-packed days and nights. It will be positioned as a City Plus experience and provides a good opportunity for activity providers to raise awareness of their offering.

Great Escapers are younger couples, some with small children interested in active and relaxed exploration of the countryside and getting off the beaten track. They want attractive and easily accessible experiences in the rural environment. Slow travel, relaxation and re-connecting with the family are important to them. Future product development includes the creation of recreation trails and geographical hubs for a range of outdoor activities.

In the short term it is the Social Energisers who will provide the best opportunity for providers but the product development aspects of the Great Escapers will also help provide some focus for the areas and businesses, especially in Kilkenny which is not within City Plus reach for the Social Energisers.

North America

North America is one of the most important markets for travel to the island of Ireland. It can deliver up to 1 million visitors a year and up to €731/£489 million in revenue. The market accounts for around 12% of total visitors to the island of Ireland, for around 20% of all overseas tourism revenue, and is distinguished by both the average length of stay of North American visitors and the likelihood that they will tour extensively around the island

Some highlights in North America for the first half of 2012:

- ▶ Over 300 million people across the US will see 'Jump into Ireland' advertising and holiday features this year.
- ▶ Promotions will target 6 million Irish Americans and Scots-Irish in key gateway cities.
- ▶ 2 million Americans will see Tourism Ireland ads in cinemas.
- ▶ 1.5 million New Yorkers a day saw Tourism Ireland advertising in Times Square for two weeks around St Patrick's Day.
- ▶ 2 million NBC viewers watched the St Patrick's parade.
- ▶ Golf, business tourism, e-marketing and social media activities, promotions like the Philadelphia Flower Show and a series of sales blitzes across the US are keeping the island of Ireland front of mind for potential travellers.
- ▶ Positive publicity worth up to €86 million will be generated by Tourism Ireland in North America this year including the distribution of e-press kits to 7,500 US media outlets

Some highlights of the campaign in the first half of 2012 across the European markets:

- ▶ Almost 29 million potential German and French holidaymakers will see advertising for the island of Ireland
- ▶ A further 5 million people across Europe will see co-operative ads with Aer Lingus
- ▶ Over 1 million Europeans have encountered the island of Ireland at top travel fairs this spring
- ▶ 1.2 million Europeans will receive good value offers each month from Tourism Ireland and industry partners

Fáilte Ireland

FI promote tourism in Ireland through a year-round integrated marketing campaign to encourage people living on the island of Ireland to holiday in Ireland. The Discover Ireland campaign includes national and destination specific promotion and drives consumers to '[Discover Ireland](#)'.

The Discover Ireland campaign includes:

- ▶ advertising
- ▶ domestic publicity campaigns and media relations
- ▶ online communications including social media activity
- ▶ Discover Ireland Special Offers campaign (print and online)
- ▶ the discoverireland.ie app
- ▶ providing a programme of in-Ireland trade events for international buyers and media
- ▶ encouraging and supporting international events to take place in Ireland
- ▶ providing visitors and holidaymakers with information while staying in Ireland via their tourist information offices

From a single discussion with FI in the South East region, it was highlighted that the outdoor offering has some potential for those domestic visitors wanting to undertake some soft adventure. FI tend to lead with events in their campaigns in the first instance, but will also use new products. County tourism organisations are funded by membership and Local Authorities. These organisations undertake their own campaigns and work with the industry on co-operative campaigns. Funding for these local tourism organisations may be in doubt following further changes in funding priorities.

We have subsequently been advised by FI that outdoor activities is 'used quite a lot really', and was sent this link to their ad which is generic. <http://www.youtube.com/user/discoverirelanddotie/featured>