• Market Research
  • Fáilte Ireland, Tourism Ireland, Ireland’s Ancient East
  • County Strategies – Waterford, Cork and Tipperary
  • Regional Strategies – Munster Vales Feasibility Study & Ballyhoura

• Workshops in Cahir, Bruff & Dungarvan

• Market Analysis
  • Key Markets – Domestic, UK, Germany with US & France
  • Market Segments
    • Domestic – Walkers, Cyclists, Over 55s, Connected Families, Footloose Socialisers
    • Overseas – Culturally Curious, Great Escapers
• Munster Vales and Ireland’s Ancient East proposal
• Get to know each other
• Their Destinations & Munster Vales
• Packages, Bundles & Itineraries
• Favourite Visitor Attractions
• Hidden Gems
• Great local stories
• Creating ‘wow’ Itineraries to sell their story, experiences, attractions & Munster Vales

Well over 50% of all the information contained in the final 3 proposed ‘Big Win’ Visitor Experience Bundles originated from the itineraries, suggestions, information and stories gathered from attendees
# Overseas Visitors to Ireland
### January-December 2012-2015 (000)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Britain</td>
<td>2,774</td>
<td>2,929</td>
<td>3,164</td>
<td>3,547</td>
<td>12.1</td>
</tr>
<tr>
<td>North America</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>USA</td>
<td>1,017</td>
<td>1,158</td>
<td>1,329</td>
<td>1,514</td>
<td>14.0</td>
</tr>
<tr>
<td>Canada</td>
<td>113</td>
<td>123</td>
<td>160</td>
<td>191</td>
<td>19.6</td>
</tr>
<tr>
<td>Mainland Europe</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>2,347</td>
<td>2,463</td>
<td>2,638</td>
<td>3,043</td>
<td>15.4</td>
</tr>
<tr>
<td>Germany</td>
<td>396</td>
<td>434</td>
<td>456</td>
<td>505</td>
<td>10.8</td>
</tr>
<tr>
<td>Italy</td>
<td>448</td>
<td>483</td>
<td>557</td>
<td>629</td>
<td>12.9</td>
</tr>
<tr>
<td>Spain</td>
<td>252</td>
<td>234</td>
<td>258</td>
<td>321</td>
<td>24.7</td>
</tr>
<tr>
<td>Belgium/Netherlands/Luxembourg</td>
<td>253</td>
<td>263</td>
<td>291</td>
<td>343</td>
<td>18.0</td>
</tr>
<tr>
<td>Norway/Sweden/Finland/Denmark</td>
<td>237</td>
<td>265</td>
<td>275</td>
<td>326</td>
<td>18.7</td>
</tr>
<tr>
<td>All Other Europe</td>
<td>191</td>
<td>210</td>
<td>200</td>
<td>234</td>
<td>16.8</td>
</tr>
<tr>
<td>Other Areas</td>
<td>570</td>
<td>575</td>
<td>602</td>
<td>685</td>
<td>13.9</td>
</tr>
<tr>
<td>Australia/New Zealand/Other Oceania</td>
<td>379</td>
<td>436</td>
<td>474</td>
<td>539</td>
<td>13.7</td>
</tr>
</tbody>
</table>

**Key Overseas Markets**
### What pastimes/events do our holidaymakers engage in?**

<table>
<thead>
<tr>
<th>Activity</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visited Gardens</td>
<td>30%</td>
</tr>
<tr>
<td>Visited National Parks/Forests</td>
<td>33%</td>
</tr>
<tr>
<td>Attended An Organised Sporting Event</td>
<td>4%</td>
</tr>
<tr>
<td>Tracing Roots/Geneology</td>
<td>2%</td>
</tr>
<tr>
<td>Attended Cultural Event/Festival</td>
<td>11%</td>
</tr>
<tr>
<td>Used Spa Facilities</td>
<td>2%</td>
</tr>
<tr>
<td>None Of These</td>
<td>45%</td>
</tr>
</tbody>
</table>

### What activities do our holidaymakers engage in?**

<table>
<thead>
<tr>
<th>Activity</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fishing</td>
<td>2%</td>
</tr>
<tr>
<td>Equestrian Pursuits</td>
<td>2%</td>
</tr>
<tr>
<td>Cycling</td>
<td>3%</td>
</tr>
<tr>
<td>Golf</td>
<td>4%</td>
</tr>
<tr>
<td>Hiking/Cross-Country Walking</td>
<td>14%</td>
</tr>
<tr>
<td>Other Water Based Activities</td>
<td>2%</td>
</tr>
</tbody>
</table>
### Did the desire for these experiences influence British holidaymakers' decision to visit?

*NB: Northern Ireland attractions such as the Giant's Causeway not included in this question*

<table>
<thead>
<tr>
<th>% Holidaymakers who said yes</th>
<th>Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>An Irish Pub</td>
<td>91%</td>
</tr>
<tr>
<td>An Irish Castle</td>
<td>52%</td>
</tr>
<tr>
<td>Dublin's Heritage and Culture</td>
<td>49%</td>
</tr>
<tr>
<td>The Ring of Kerry</td>
<td>27%</td>
</tr>
<tr>
<td>The Cliff's of Moher</td>
<td>21%</td>
</tr>
<tr>
<td>Connemara</td>
<td>17%</td>
</tr>
<tr>
<td>The Rock of Cashel</td>
<td>13%</td>
</tr>
</tbody>
</table>

The Irish Pub is still a key pull for British holidaymakers choosing Ireland, as are our castles and Dublin’s heritage and culture.

The Giant's Causeway gets a big call-out as an aspirational experience by British people at home.

### Did you experience any of the following on your holiday in Ireland?

*NB: Northern Ireland attractions such as the Giant's Causeway not included in this question*

<table>
<thead>
<tr>
<th>% Holidaymakers who said yes</th>
<th>Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listened to the live music in a pub</td>
<td>90%</td>
</tr>
<tr>
<td>Tasted Guinness</td>
<td>87%</td>
</tr>
<tr>
<td>Visited a coastal town</td>
<td>73%</td>
</tr>
<tr>
<td>Visited a food or craft market</td>
<td>50%</td>
</tr>
<tr>
<td>Taken part in a city tour</td>
<td>36%</td>
</tr>
<tr>
<td>Followed a literary trail</td>
<td>8%</td>
</tr>
</tbody>
</table>

Key Influencers?
<table>
<thead>
<tr>
<th>Activity</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiking/walking</td>
<td>22</td>
</tr>
<tr>
<td>Houses/castles</td>
<td>20</td>
</tr>
<tr>
<td>Visits to spas</td>
<td>19</td>
</tr>
<tr>
<td>National parks</td>
<td>18</td>
</tr>
<tr>
<td>Watersports (excluding swimming)</td>
<td>18</td>
</tr>
<tr>
<td>Gardens</td>
<td>16</td>
</tr>
<tr>
<td>Heritage/ interpretive centres</td>
<td>15</td>
</tr>
<tr>
<td>Museums/art galleries</td>
<td>11</td>
</tr>
<tr>
<td>Cycling</td>
<td>8</td>
</tr>
<tr>
<td>Golf</td>
<td>6</td>
</tr>
<tr>
<td>Angling</td>
<td>2</td>
</tr>
<tr>
<td>Attending horse racing</td>
<td>2</td>
</tr>
<tr>
<td>Equestrian pursuits</td>
<td>2</td>
</tr>
</tbody>
</table>

*Source: Fáilte Ireland Domestic Omnibus 2014*
Priority Global Customer Segments?
Culturally Curious & Great Escapers

Target Sales Message?
- 5,000 years of European history in a compact, accessible area
- Stories told by the greatest storytellers in the world
- It’s easy to take it all in » To go at your own pace
- To dip in or delve in » To meet great people
- And to enjoy unique and diverse places that have inspired for thousands of years

Priority Markets?
- Great Britain & North America
- Germany & France

Ireland’s Ancient East?
- **Domestic Market** – Full direct access & travel practically all year round
- **Great Britain** – our largest source of overseas visitors. Key access – Rosslare, Dublin Ports, Waterford, Cork & Shannon Airports
- **Germany** – our largest Mainland Europe market. Key access - Waterford (onward connections through London Luton), Cork, Kerry, Shannon & Dublin Airports
- **US** – key with diaspora links and are avid touring visitors
- **France** – our second largest Mainland Europe market. Ports Cork & Rosslare & Cork, Shannon, Waterford (connections through London Luton) & Dublin
Domestic Market

Segments?

Domestic: Walkers, Cyclists, Over 55s, Footloose Socialisers & Connected Families

- Walkers: Mountaineering Ireland’s membership (2015) numbered 11,500, with 184 clubs and 1,400 individual members

- Cyclists: Since 2009, membership of Cycling Ireland has grown from 5,600 to 23,000 in 2014. Clubs grown from 174 to 398

- Over 55s: Active Retirement Ireland (ARI) membership of over 24,500 - 550 local associations. Growth of 30% in 4 years

Footloose Socialisers:
- Authentic & interesting surroundings
- Go off the beaten track, meet the locals & get under the skin
- Good food & drink; Interested in the history & culture

Connected Families: create family memories that remind them of their own childhood
Culturally Curious

• What are they most likely to be seen doing?
  • Exploring small towns & villages, experiencing history & culture simultaneously
  • Exploring landscapes – Megalithic or early Christian relics
  • In castles, gardens, museums, country houses & art galleries
  • UNESCO sites, visitor centres, browsing for books to deepen their experience
  • Enjoying good food & wine, particularly local specialities
  • Unique local festivals & events
  • Walking, cycling or pleasure boating to explore a new place
  • Talking to locals to get a different take on the story of a place

Overseas Market Segments?
Great Escapers

What are they most likely to be seen doing?

• Enjoying the beauty of breath-taking landscapes
• Visiting the coastline
• Exploring remote & exciting landscape through walking or cycling
• Standing together on the top of a mountain or cliff
• Visiting a castle or landmark
• Enjoying relaxing meals with local produce or a lovely evening in an authentic pub
3 Year Marketing Plan

Start on Our Doorstep with You!

- Become a part of the Munster Vales Identity – promote MV LOGO on your Traditional & Digital marketing
- Use the BUNDLES & Itineraries in your Marketing Materials e.g. Websites, Enquiry Responses, Email signatures, Brochures, Social Media, Promotions
- CREATE YOUR OWN and modify the MVs Bundles & Itineraries to suit your business and add to Munster Vales
- PROMOTE IT to your families, neighbours, guests, trade, press – Talk it up!
- CLUSTERING of Experiences within your Destination
- Get people to STAY in your area and the Munster Vales – longer dwell time

Where & How Do We Market the Munster Vales?
Marketing Plan
Core Elements

Promotions
Digital PR
Domestic Media
Advertising Sponsorship Marketing Materials
Direct Marketing
Tour Operators

Rock of Cashel, Tipperary
Outline Action Plan
Year 1
Visitor Experience Itineraries
Potential National Benchmark for Irelands Ancient East

Tourist want Unique, Interesting & Authentic Local Experiences

Tourist Want Stories & Hidden Gems and Local Recommendations

Tourists need your valuable Local Knowledge to inspire them

Weave Stories into a set of Itineraries

Lough Gur
Process of Building Visitor Experience Itineraries
Adopt and Promote these 1st x3 Bundles & partner with other Businesses

Big Opportunity: Munster Vales & Ireland's Ancient East can then help you with marketing and promotion – ‘piggyback’

Inclusive, not Exclusive – Drafts purposefully contain too many places to visit each day

Keep Story/Theme - modify to suit you! adapt itineraries to feature your business

Visitor Experience Itineraries
Potential National Benchmark for Irelands Ancient East
Weave Stories into an Itinerary

In the footsteps of the Fianna
Munster Vales Experiences

‘In the Footsteps of the Fianna’

Day 1
- Buttevant
- Ballyhass Lakes
- Charleville
- Kilmallock

Day 2
- Glen of Aherlow
- Doneraile NP

Day 3
- Lough Gur
- Bruff
- Kilfinnan
- Mitchelstown
- Galtee Mtns.
- Tipperary
- Ballyhoura Mtns.

Galtymore
Mitchelstown Caves
Bansha
‘In the Footsteps of the Fianna’
Weave Stories into an Itinerary

Castles from Wave to Vale
Munster Vales Experiences

‘Castles from Wave to Vale’
Munster Vales Experiences

‘St. Declans Way Pilgrim Trail’
DRIVING & CYCLING ROUTES

Comeragh Drive - 115km (70miles)
Butler Trail - 95km (60miles)
Copper Coast Drive - 165km (100miles)
Suir Valley Drive – 130km (80miles)
Glen of Aherlow Loop – 95km (60miles)
The Vee Drive - 80km (50miles)
Ballyhoura Drive - 125km (75miles)
Sli Finn Drive – 30km (20miles)
Golden Vale Drive – 112km (70miles)
Thank You
Brian & Caroline & Munster Vales