



Northern Ireland Workshop – November 2021

◦ A Touch of Ireland ◦ Abbey Ireland & UK ◦ Adams & Butler ◦ Advantage DMC ◦ Alainn Tours ◦ Brack Tours ◦ Brendan Vacations ◦ By Appointment DMC Celtic Horizon Tours ◦ CIE Tours Intl ◦ Custom Ireland ◦ Discover Ireland Tours ◦ Eirebus DMC ◦ El Travel Group ◦ Event Partners ◦ Excursions Ireland ◦ Hello Ireland Tours (HIT) 32CC Group ◦ Irish Rugby Tours ◦ JAC Travel ◦ Irish Tourism ◦ Joe O'Reilly Ireland Group ◦ Kleemann Tours ◦ Limerick Travel Mera Events ◦ Moloney & Kelly ◦ Odyssey International ◦ Ovation Ireland ◦ Premier Travel ◦ RIT Travel ◦ Shamrock Adventures ◦ Specialized Travel Services ◦ Tour Partner Group ◦ Vagabond Tours of Ireland ◦ Wallace Travel Group ◦ Wilderness Ireland

RUTH ANDREWS – CEO, ITOA

MAKING THE MOST OF ITOA WORKSHOPS



What is ITOA

- Incoming Tour Operators Association – Ireland is a sectoral representation body promoting the activities of its' members and the worldwide travel trade distribution channel with whom our members partner & deliver Ireland packaged tourism product

What ITOA dose

- 🌀 The Association provides advocacy for its members
- 🌀 Collaborate with other representative organisations and tourism agencies on industry wide issues
- 🌀 Provide promotional platforms for members and access to industry supports
- 🌀 Raise the profile within Irish Tourism of the importance of the global travel trade distribution channel
- 🌀 Provide useful insights to members on product development and overseas markets
- 🌀 Provide training and development opportunities
- 🌀 Conduct on-going research relevant to members

What does ITOA NOT Do?

- 🌀 Collective marketing
- 🌀 Contracting on behalf of its' members
- 🌀 Pricing Negotiations with Product Suppliers

Partnership Approach

ITOA:

- ② Strong Collaborative Relationship with Tourism Agencies & Tourism Industry Representative Organisations
- ② Active Members of ITIC
- ② Participate at all tourism industry boards, steering committees, councils – Tourism Recovery Taskforce Groups NI & ROI.

Members:

- ② Marketing and Sales Force working in Partnership with All Tourism Industry Suppliers Nationally
- ② Key role in Designing & Influencing Of Ireland Packaged Product with International Travel Trade – Ireland Experts
- ② Market Intelligence

Our Members

34 Members

Independent Commercial Companies



Membership Comprising of:

- Tour Operating Companies
- Handling Agents
- DMCs – Destination Management Companies
- PCOs – Professional Conference Organisers

What do ITOA Members Do?

-  Market/Sell the Island of Ireland
-  Bundling & Package Entire Tourism Product
-  Partner with Worldwide Overseas Tour Operators & Travel Trade to ensure Ireland programmed Internationally
-  Sell Direct to Consumers, group organisers and corporate clients
-  Provide 24/7 customers service/care
-  Participate in Annual Industry Workshops – March East & West Coast & November Northern Ireland
-  On-going research in the market-place to identify new segments and business opportunities and that address market requirements

Members Customers

-  Overseas Partner Operators – 90% B2B
-  Overseas Consumers B2C – 10% On-line

Leisure Business

-  Global Tour Operators
-  Group Organisers,Wholesalers
-  Travel Agents
-  Consumers – Individual FIT's
-  Special Interest
-  Operators/Organisations

Business Travel (MICE)

-  Incentive Houses
-  Conference Organisers
-  Corporate Meetings & Events

Business Categories

- Tour Series
- Special Events
- Ad Hoc Groups
- Individual Traveller (FIT)
- Study & Special Interest Groups
- Business Travel –
Incentive/Corporate Meetings
- Conferences
- Events & Festivals



Trade Distribution Channels



ITOA members delivered

705,500

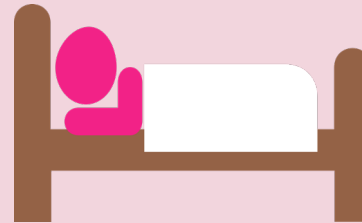
promotable visitors in 2019



ITOA members spent

€259 million with Irish

tourism businesses:



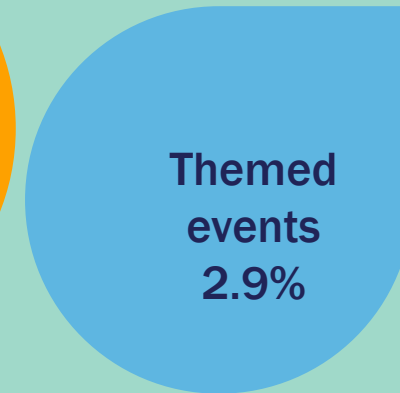
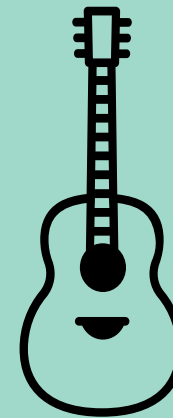
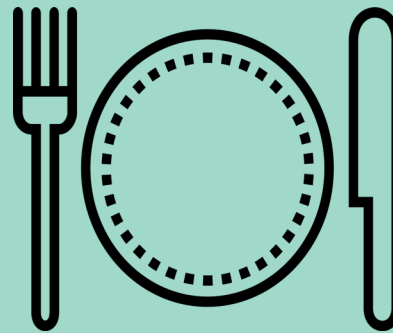
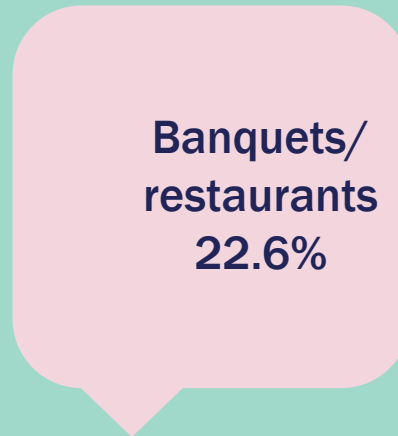
59.5% on
accommodation

22.5% on
transport and guiding
services



14% on
entertainment and
attractions

Visitor spend on entertainment/attractions was:



Where did visitors come from?



- Continental Europe **36%**
- North America **51%**
- Great Britain **8%**
- Rest of the world **5%**

ITOA members collectively
spent

€12.5 million

on marketing and selling Ireland
internationally



Tourists handled by ITOA members
spent

€565 million

holidaying in Ireland, representing
11% of national tourism receipts



Business categories were:

- Group tours at **63.5%**
- FIT individuals at **23.5%**
- MICE at **13%**

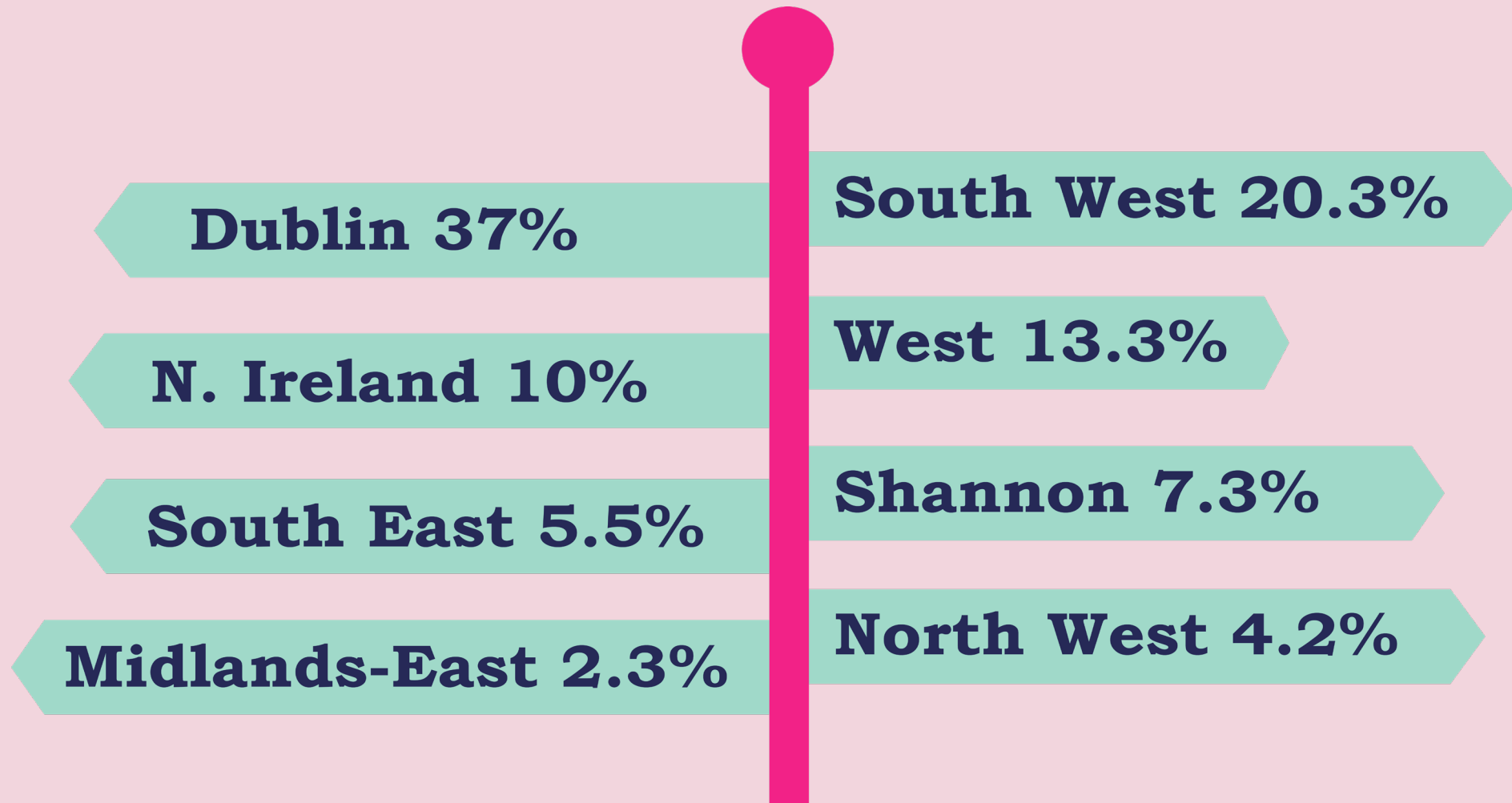


The average length of stay for ITOA tourists was:

- **8** nights for groups
- **5.6** nights for FIT visitors

The average visitor spend was €904, 20% more
than the national average of €752

ITOA members' visitors stay longer and visit more regions – **63%** visit outside of Dublin



Recovery 2022

- Predicated on overseas market conditions & strong air access recovery
- ITOA collective membership **Future Pipeline of Business**
 - 2022 currently @ 60% of 2019 levels = €360 Million revenue and 420,000 visitor numbers.
 - 2022 – 2024 business pipeline value of €1.4 Billion and 1.65 Million visitors over 3 years.

HOW ITOA MEMBERS WIN BUSINESS

Advantage of Working with ITOA Members

- ✓ Provide a mix of business
- ✓ Well established distribution channels & established customer base
- ✓ Market intelligence – experts in travel
- ✓ Provide a base of business 6-12 months in advance
- ✓ Long-term relationships = Year on Year Business

ITOA Members Activity During COVID

Virtual platforms 2020/21

- ITOA Members focused on retaining existing bookings from 2020 to 2021/2022
- Maintaining client relationships through virtual engagements and online platforms
- Constant review and consideration of redesigning holiday and business tourism programmes
- Re-organising structures to retain vital intellectual capacity of teams to enable recovery
- Engaging with Irish suppliers
- TNI support invaluable for trade and industry

Normal Sales/Marketing Activities

- Travel Trade Fairs & Promotions Overseas
- Participation in Organized Sales Missions
- Regular In-Market Sales Calls
- Client Staff Sales Training
- Partner & Targeted Client Familiarization Visits & Educational
- Site Inspections
- RFP's & Bid Proposals
- On-line Trade & Consumer Web-sites
- Active Engagement with Tourism Ireland In-Market

ITOA Workshops

Be prepared to make the most of 10 minute appointments – allowing time for short concise presentations and discussion

ITOA Members Requirements

➤ 2022 & 2023 Group and FIT rates

➤ Flexibility

- Date Changes & Booking Transfers
- Realistic T&C's i.e. Group sizes and final confirmation of numbers due to later booking timelines and potential travel restriction changes
- Supply chain complexity requires flexibility to meet all actors in the channel
- Innovation – share new ideas for experience delivery
- Sustainable recovery – what's new or planned
- Partnership approach
- Follow up & stay in touch with timely updates

Workshops – Market Intelligence

- Pent-up demand – people keen to travel again
- Consumer confidence not yet fully recovered – hassle factor
- Want assurance of flexibility and payment terms
- Advice on travel safety and entry/departure requirements
- Competitiveness will be a key component to early movers i.e. airline offers to generate demand with flexibility to alter arrangements
- Value for money and quality experiences
- Post Covid travel – change in consumer expectation and type of holiday – more space and outdoor experiences potentially



AOB

THANK YOU

QUESTIONS?