



WOW Visitors: Win Business Customer Experience Summit

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CEO Fáilte Ireland

Video slide



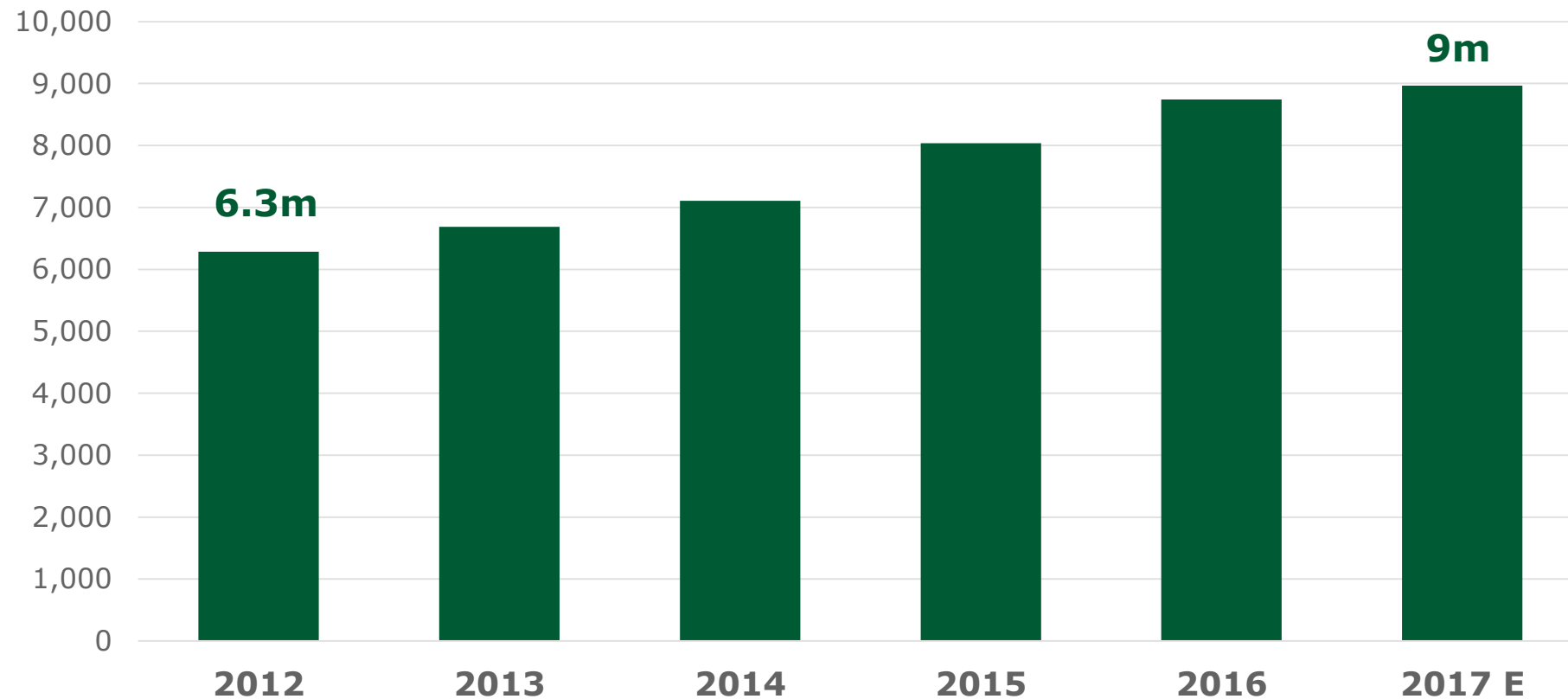


Tourism is one of Ireland's biggest indigenous industries and it is growing

Metric	2017 E vs 2016	Value
Overseas Tourists	+3%	9m
Overseas Spend	+5%	€4.9b
Domestic & NI Spend	+3%	€2.2b
Total Tourism Spend	+4%	€7.1b
Employment	+10,000	235,000 jobs

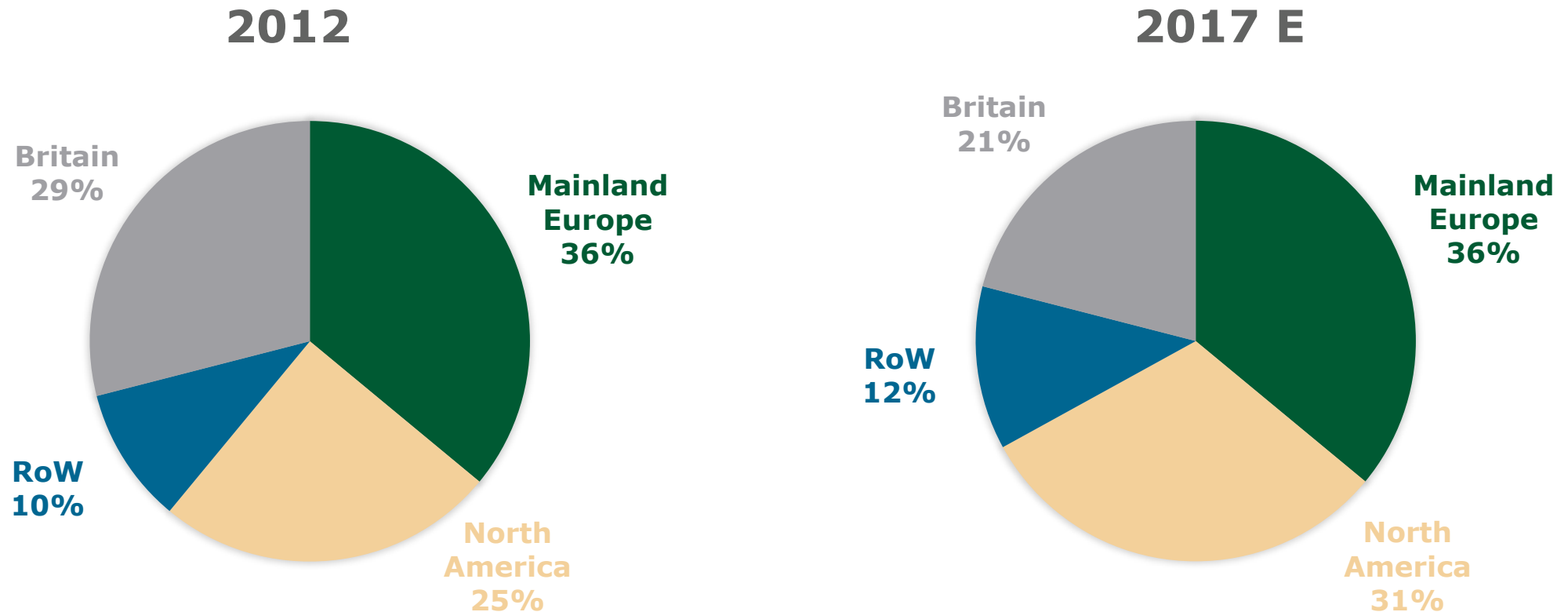
HUGE GROWTH IN OVERSEAS TOURISTS

Overseas tourists up 43% since 2012 with an estimated 9m overseas tourists in 2017



Source: CSO, NISRA & Fáilte Ireland estimates

BUILDING A MORE BALANCED AND SUSTAINABLE EXPENDITURE PROFILE OF OVERSEAS VISITORS

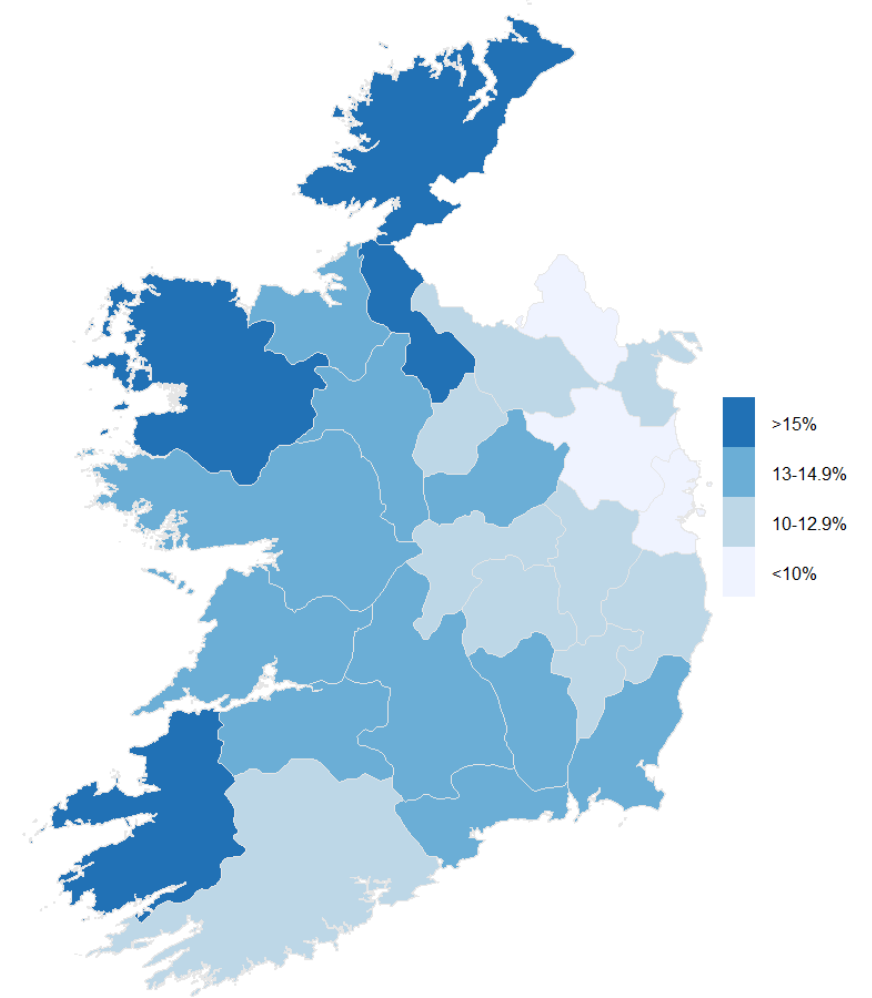


Source: CSO, NISRA & Fáilte Ireland estimates
Figures based on tourism spend

TOURISM IN REGIONAL COMMUNITIES

- Tourism plays a vital role in supporting regional communities particularly in the west and midwest areas

Source: Central Statistics Office



Share of BUSINESSES that operate in tourism



REGIONALITY

Tourism is Spreading

Bed Nights	2017	2016
Dublin	10.2m	+9%
Rest of Ireland	16.5m	+11%



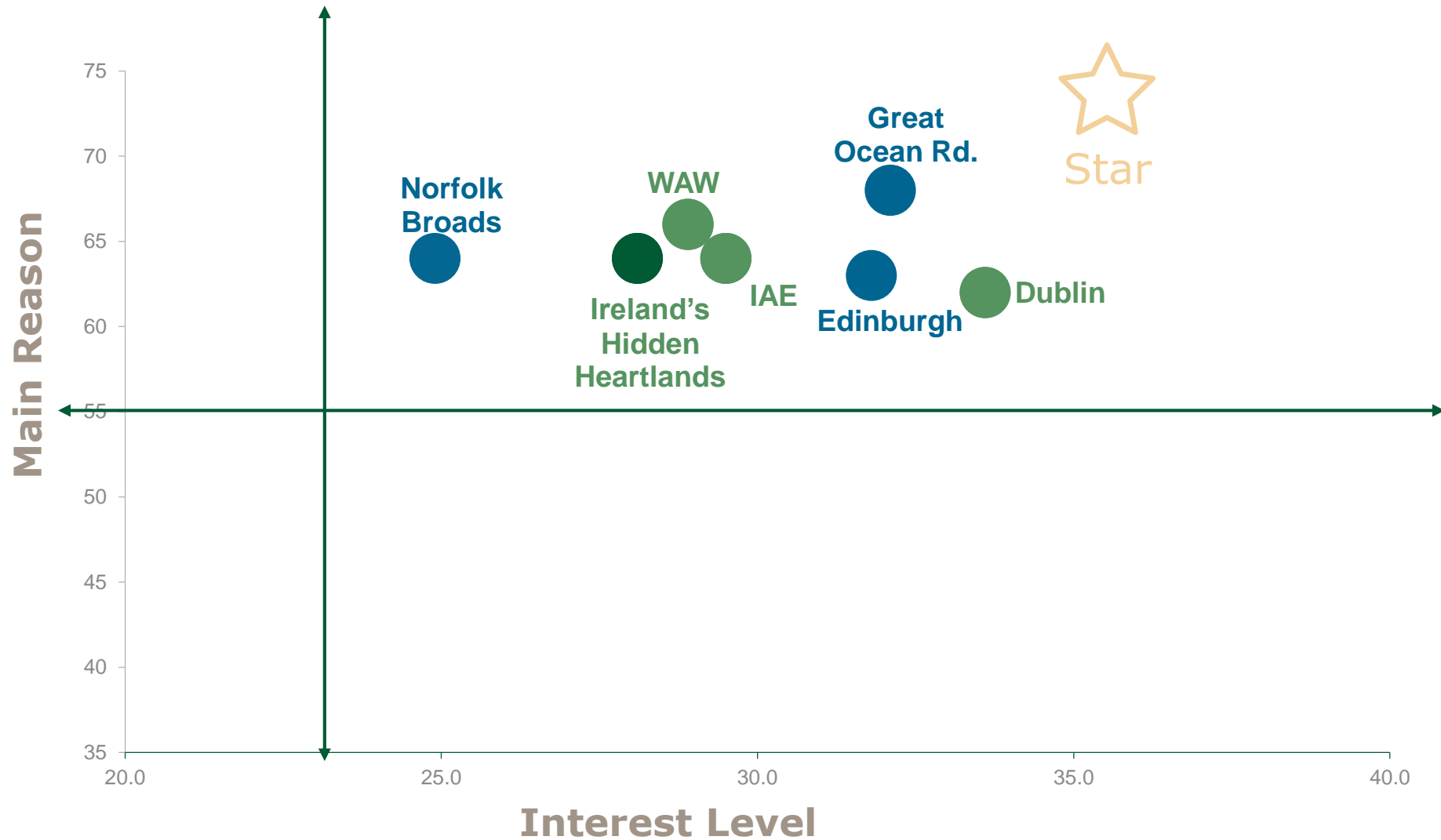
SEASONALITY

The Season is Getting Longer

Bed Nights	2017	2016
Summer Peak	11m	+8%
Off Peak	16m	+12%







OUR BRANDS WORK

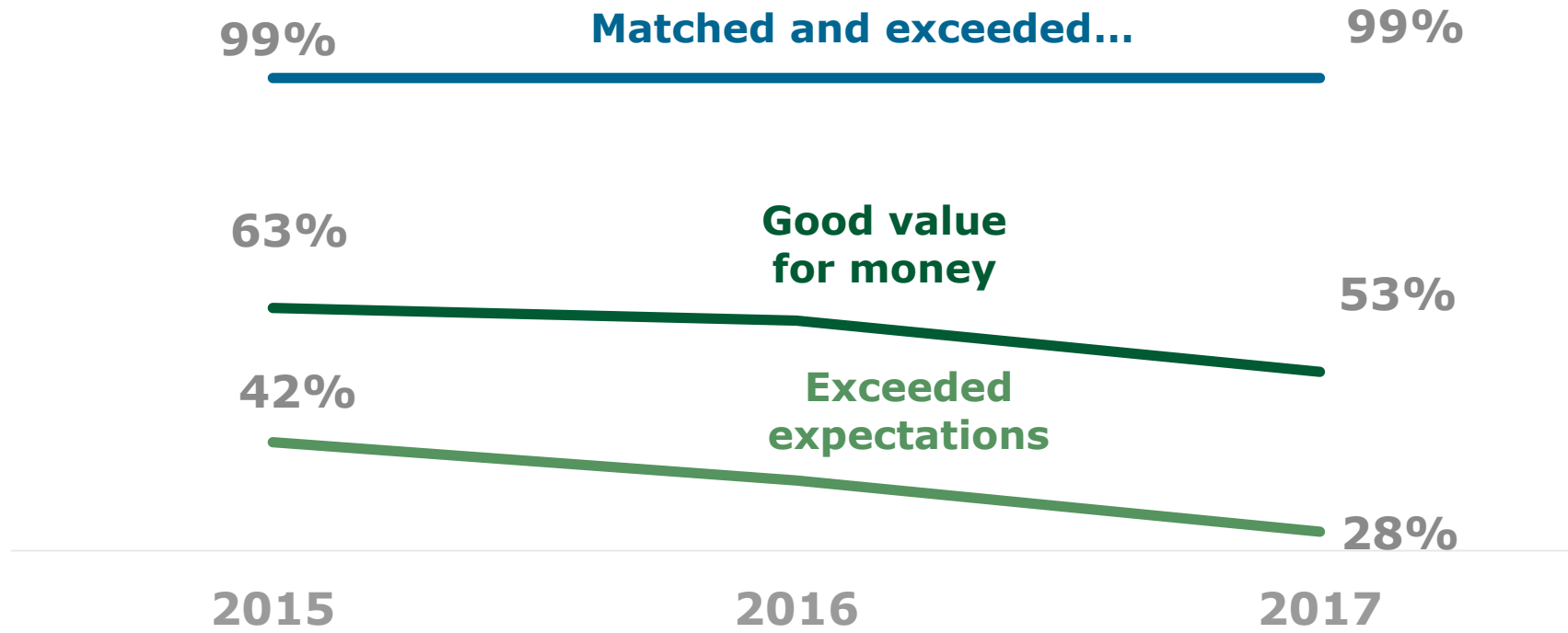


- Strong appeal
- Move people to 'buy now'
- Complement Ireland brand

**WE NEED TO DELIVER THE
PROMISE EVERYWHERE
EVERYDAY**



OVERSEAS HOLIDAYMAKERS ARE HAPPY... BUT NOT AS HAPPY AS THEY USED TO BE





- Highly competitive market – international competitors improving all the time
- Highly demanding consumers – most product categories are improving at an exponential rate – holiday experiences need to keep up.
- As prices increase so do service / experience expectations.



**Thank You
Paul Kelly
CEO Fáilte Ireland**