





### Video slide



Goals

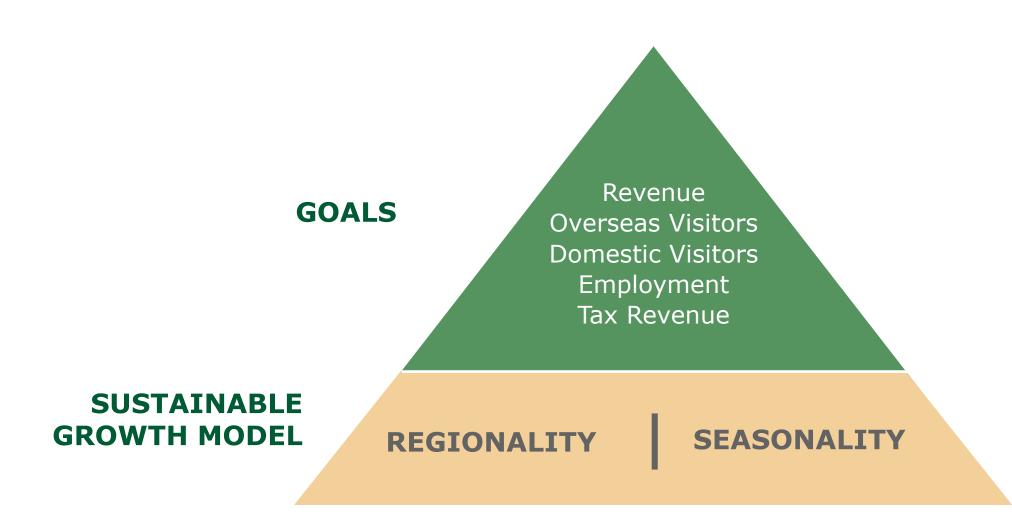
**Sustainable Strategies** 

**Brand Architecture** 

**Action Areas** 

**Collaboration Structures** 







### **ACHIEVING OUR GOALS**

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

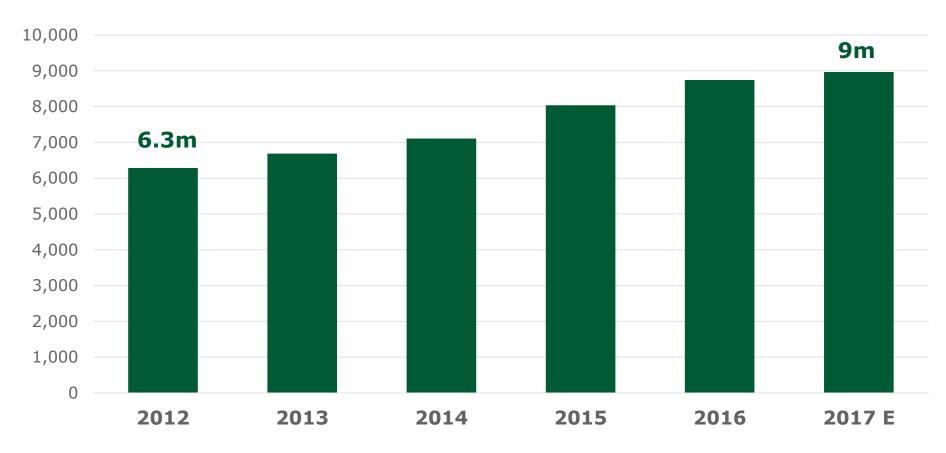
Metric	2017 E vs 2016	Value
Overseas Tourists	+3%	9m
Overseas Spend	+5%	€4.9b
Domestic & NI Spend	+3%	€2.2b
Total Tourism Spend	+4%	€7.1b
Employment	+10,000	235,000 jobs

Source: CSO & Fáilte Ireland estimates



### **HUGE GROWTH IN OVERSEAS TOURISTS**

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

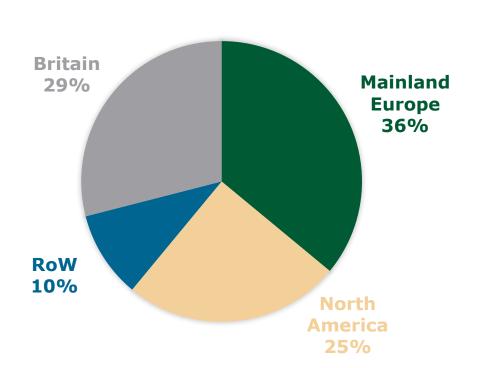


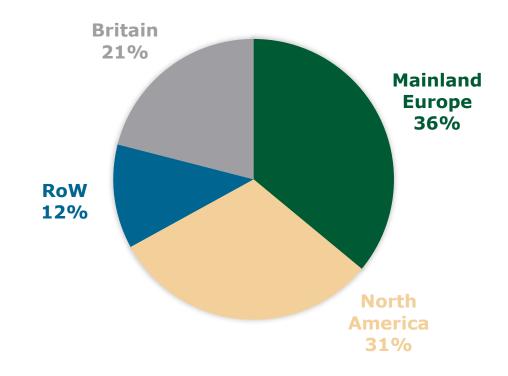
Source: CSO, NISRA & Fáilte Ireland estimates



### BUILDING A MORE BALANCED AND SUSTAINABLE EXPENDITURE PROFILE OF OVERSEAS VISITORS

2012 2017 E



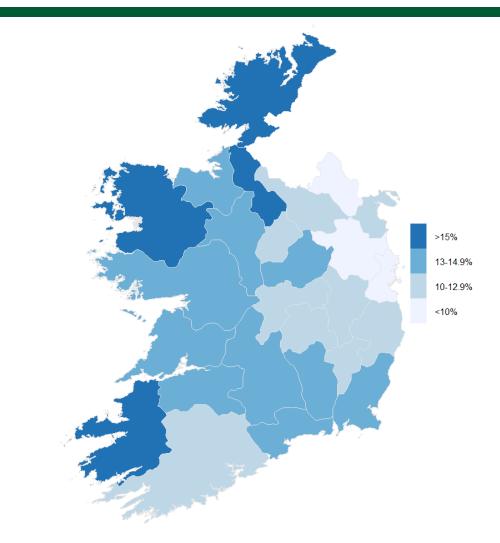


Source: CSO, NISRA & Fáilte Ireland estimates Figures based on tourism spend



### TOURISM IN REGIONAL COMMUNITIES

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



**Share of BUSINESSES that operate in tourism** 

Source: Central Statistics Office





## **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%







### THE BRANDS PORTFOLIO













### **OUR BRANDS WORK**





### **OUR BRANDS WORK**



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

# WE NEED TO DELIVER THE PROMISE EVERYWHERE EVERYDAY



#### Goals

**Sustainable Strategies** 

**Brand Architecture** 

### **ACTION AREAS**

Supporting
Development
of a World
Class Industry

Working with
TI on Sales &
Marketing to Overseas
Holiday Makers

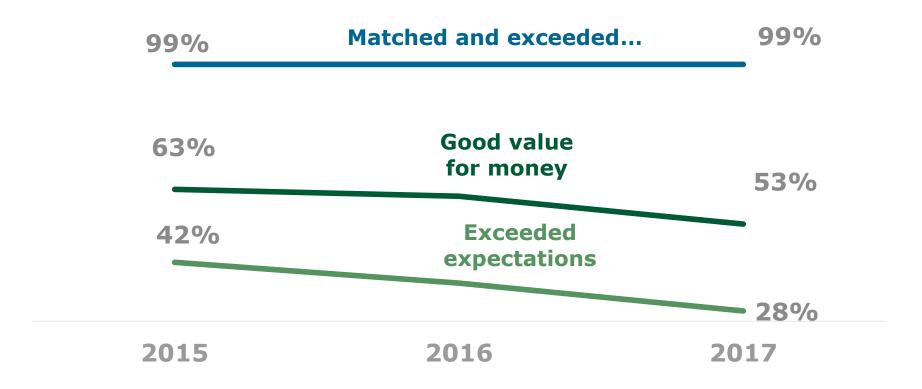
Sales &
Marketing to
ROI & NI
Holiday Makers

Building Brilliant Visitor Experiences Supporting Development of a Visitor Friendly Infrastructure & Community

Attracting
International Business
& Events Visitors



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





#### **BRILLIANT VISITOR EXPERIENCES**



- 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.



