



TOURISM 2009 ... STAYING ON COURSE

Operations Plan 2009

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Fáilte Ireland's Operations Plan 2009



Introduction



The last few years have been a period of sustained growth for the tourism sector. Fáilte Ireland, through its programmes of industry support, has been a part of that growth. However, we have now seen a slowdown and, in 2009, we will face the challenges of a poor global economy. This economic environment will present particular challenges in our key source markets, notably Britain and the US, while at home pressure on disposable incomes may force a change in holiday patterns.

To make matters more difficult, tourism businesses are already experiencing tightening margins as a consequence of rising costs and aggressive pricing policies, particularly within the accommodation sector. Tighter margins have implications for the ability to re-invest. In recognition of this, our plans for 2009 take account of both the short-term support needs of tourism enterprises and the longer-term development requirements of the tourism industry and will be delivered through our six core areas of activity.

Our plans for **Business Development and Investment** will enable us to continue to work in partnership with the industry to invest in infrastructure, activities and events – the important “things to do” that visitors look for. Our **Enterprise Development** services will be expanding the range of practical supports they provide to individual companies and operators with particular emphasis on IT and cost containment skills. Through our **Tourism Training** work, we will continue to provide a professional and skilled tourism workforce – whether it is teaching new entrants in training centres or up-skilling existing workers on-site.

Our **Regional Development** team will be energetically driving the marketing of home holidays again this year – seeking every opportunity to persuade Irish people to take breaks at home. Additionally, our local Fáilte Ireland teams will be ensuring that development takes place evenly around the country and that the particular potential of each region is fulfilled.

Our **Environmental Unit** will continue the implementation of our Environmental Action Plan 2007-09 but will also be placing increased emphasis this year on practical support and advice – such as the cost savings which individual companies can attain through smarter energy usage. Finally, the work of our **Research and Policy Division** will give us the supporting evidence to continue to act as an advocate for the tourism industry. Through research and policy analysis, we will develop and maintain a pro-tourism voice in the development of public policy.

As I have said, the last few years were good for Irish tourism but now we face a more challenging period. Despite the short-term difficulties directly ahead, we should not despair. Indeed, the longer-term indicators are still pointing upwards, and there is reason to believe that, despite the difficult circumstances we find ourselves in at present, properly managed and properly resourced tourism firms can trade their way out of this recession.

Therefore, the challenges many in the industry will face include not only those of sustainability in the short-term but also how to achieve further growth and development in the longer term.

Accordingly, we have worked to ensure that these plans provide a comprehensive framework to support tourism enterprises in weathering the present storms and also to lay the groundwork for further growth when global and economic conditions improve.

A handwritten signature in black ink, appearing to read 'Shaun Quinn', with a horizontal line underneath.

Shaun Quinn

Chief Executive – Fáilte Ireland





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Developing “Things to do and see”

As a national authority, Fáilte Ireland is dedicated to developing tourism in Ireland. This includes investing wisely in tourism product and services – in the infrastructure, attractions, activities and events that contribute to Irish tourism.

In 2009, we will pursue a pragmatic and balanced approach to all products and services – with a focus on sustainability in the near-term as well as the longer term positioning of our various tourism products.

The Challenge

Ireland is now a mature tourism destination facing tough trading conditions in its key markets and increased competition from many emerging destinations.

Nonetheless, the tourism sector is not lying down and is setting very ambitious targets in terms of growth in visitor numbers and revenues between 2009 and 2013. In helping the sector to meet these targets, Fáilte Ireland will seek to support balanced regional growth in the tourism industry.

Our Mission

To achieve long term growth nationally and regionally, Fáilte Ireland will continue to work with our industry partners to deliver the range and quality of holiday experiences that meet and exceed consumer expectations. We will continue to support investment in a range of existing and new attractions, activities centres and events with a view to enhancing the Irish tourism industry's potential to achieve its growth objectives despite increasing competition across all of our key markets.

In 2009, the key issues to be addressed by Fáilte Ireland will include supporting capital investment and innovation, promoting greater co-operation between tourism enterprises, raising quality standards and improving information availability.

Our Business Development and Investment Services for 2009 are outlined in the following pages.

AREA	ACTION
CAPITAL INVESTMENT	<p>Fáilte Ireland has received a capital investment allocation of €11m under its 2009 Budget and will invest these monies on the following basis:</p> <ol style="list-style-type: none"> 1. Complete the rollout of the Historic Towns Project to a total of 65 towns. 2. Complete the evaluation and processing of applications received from the private and public sectors for capital grant assistance for the development of tourist attractions and activities. 3. Develop a small number of additional looped walks in conjunction with the Department of Community, Rural and Gaeltacht Affairs.
TAX INITIATIVES	<ol style="list-style-type: none"> 1. Raise awareness in the industry of tax initiative schemes such as the Business Expansion Scheme. 2. Work with potential promoters to maximise utilisation of the available incentives (Business Expansion Scheme, Seed Capital Scheme and Mid Shannon Corridor Tax Incentive).
SPORTS TOURISM	<ol style="list-style-type: none"> 1. Work with our partners to maximise Ireland's exposure at each stopover of the Volvo Ocean Race and ensure that the Galway stopover is an enjoyable and memorable experience for participants and visitors alike. 2. Secure the long term development of the Irish Open. 3. Maximise the value Ireland derives from the opportunities offered by the Solheim Cup and the Ladies Irish Open. 4. Maximise Ireland's exposure from our sponsorship of the 2009 World Rally Championship event. 5. Exploit the overseas media and domestic holidays promotional opportunities arising from the Dublin Horse Show sponsorship.

AREA	ACTION
FESTIVALS AND EVENTS	<ol style="list-style-type: none"> 1. Support key festivals which encourage the spatial spread of visitors throughout the country. 2. Develop National and Regional Programmes to facilitate funding for festivals and events. 3. Create and facilitate a forum for festival organisers to input into a three-year action plan (2010-2013).
GOLF INDUSTRY DEVELOPMENT	<ol style="list-style-type: none"> 1. Fáilte Ireland has increased its golf development budget by 50% and will continue to work in partnership with the industry through the Golf Industry Forum and its associated Working Groups to put in place a package of practical measures that will enhance the competitiveness of the sector. 2. Work with our partner agencies to deliver new and more focussed communications campaigns with the particular emphasis on the GB, Nordics and USA marketplaces. 3. Deliver a new golf website with enhanced online booking capability, in conjunction with our industry partners. 4. Deliver an upweighted trade support programme with a view to facilitating industry partners to reach their target markets and drive overseas business. Support levels will also be confirmed to partners at an earlier date to align with the key selling period. 5. Deliver a new golf course categorisation system and an associated Tourism Charter that will set out a product and service commitment to overseas and domestic golf visitors. 6. In consultation with our industry partners, implement a package of skills/enterprise development initiatives that support the competitiveness of individual golf courses. These will in all likelihood include programmes on eCapability, strategic pricing and yield management and delivering profitable food service operations. 7. Work with the Golf Industry Forum to deliver a 'Value Golf' Programme covering all regions of the country and driven through our domestic and overseas marketing activity.

AREA	ACTION
HERITAGE & CULTURE – DELIVERING A BETTER VISITOR EXPERIENCE	<ol style="list-style-type: none"> 1. Increase support and resources to cultural and heritage products. 2. Develop themed product offerings that will enhance the 'story telling' around key heritage sites (Christian Ireland, Norman Ireland etc). 3. Develop and activate a new Natural Heritage strategy to support an industry wide approach to sustainable tourism practices in areas such as ecology (for example; our peatlands), whale watching, bird watching and national parks, and develop specific eco-tourism offerings in conjunction with key industry partners. 4. Formulate an integrated development plan for our Traditional Culture products (music, dance, crafts, Gaelic games, Irish language and our islands) in conjunction with our industry partners and ensure these products feature heavily in our overseas marketing. 5. Deliver a development plan for arts and contemporary culture products (art, literature, theatre, festivals and film) that will ensure that visitors to our urban centres in particular enjoy a memorable experience. 6. Develop online booking and integrated ticketing solutions that make it easier for visitors to purchase/access the heritage and culture product. 7. Implement an expanded trade support programme to facilitate enterprises in getting to market and in securing international business.

AREA	ACTION
OUTDOOR ACTIVITY PURSUITS	<ol style="list-style-type: none"> <li data-bbox="480 165 1458 225">1. <i>Walking</i>: Continue to develop looped walks and to enhance eMarketing of them, and feature walking prominently in our overseas and domestic campaigns. <li data-bbox="480 261 1458 320">2. <i>Cycling</i>: Continue to develop new cycling hubs and focus on new hubs developed in 2007/2008 in both overseas and domestic promotional campaigns. <li data-bbox="480 357 1458 480">3. <i>Angling</i>: There has been significant capital investment in angling infrastructure over the past 18 months under the NDP programme. In 2009, the focus will shift to securing a return on this investment by accelerating/intensifying the level of service development and marketing of targeted centres of excellence in all regions both at home and overseas. <li data-bbox="480 517 1458 608">4. <i>Equestrian</i>: 60 riding centres have been inspected and approved for the new Tourism Standard by AIRE. These centres operate primarily in the tourism business. A business development programme will be implemented for these centres for 2009. <li data-bbox="480 644 1458 735">5. Continue to work closely with relevant sectors including golf, equestrian and B&B to implement new classification and categorisation systems to underpin product quality and aid consumer decision-making. <li data-bbox="480 772 1458 831">6. Explore and deliver a branding mechanism or 'quality mark' that will allow operators to leverage categorisation/classification initiatives across the various product sectors. <li data-bbox="480 868 1458 959">7. Deliver an upweighted trade support programme with a view to facilitating industry partners to get to market and drive overseas business. Support levels will also be confirmed to partners at an earlier date to align with the key selling period. <li data-bbox="480 995 1458 1054">8. Deliver a suite of new/enhanced product websites with better content and functionality (with a particular focus on working with our industry partners to deliver greater online bookability).

AREA	ACTION
SME HOSPITALITY SECTORS	<ol style="list-style-type: none"> 1. <i>Accommodation</i>: Continue to use trade support to allow key partners access overseas markets to promote their product whilst embarking on longer-term product development plans for key sectors such as B&Bs and self catering. 2. <i>Food</i>: Deliver a food tourism strategy for Ireland, partnering with Bord Bia, RAI, IHF, ITOA and key marketing groups such as Good Food Ireland. Deliver targeted skills training, enterprise development and marketing programmes, as well as partnering with marketing groups to allow them reach their target markets and promote all that's best in Irish food and food ingredients. Deliver a new food tourism website to support our overseas and domestic promotional efforts.
TOURISM ENTERPRISE GROUPS	<ol style="list-style-type: none"> 1. Establish 18 co-operative cross-sectoral enterprise groups (accommodation, food, attractions and activity providers) that will collaborate together and with Fáilte Ireland and other agencies to drive product development and marketing initiatives.
BUSINESS TOURISM	<ol style="list-style-type: none"> 1. Deliver a Business Tourism Quality Mark to underpin the sectors, efforts to delivering a consistently high standard of functional service delivery. 2. Deliver an enhanced trade support programme that supports the efforts of industry partners seeking to deliver association conference and corporate meetings and incentive business. 3. Deliver an enhanced irelandinspires.com website that better facilitates the industry's online selling effort.
BETTER EBUSINESS SOLUTIONS TO ENHANCE OUR VISITOR SERVICING	<ol style="list-style-type: none"> 1. Redesign the Fáilte Ireland corporate and consumer websites (www.discoverireland.ie , product sites, regional sites), delivering enhanced content and 'look & feel'. 2. Deliver new online reservations systems. 3. Investigate the use of new technologies to enhance the visitor experience. Possibilities include: podcasts for traditional culture. 4. Investigate the use of new technologies to make it easier for visitors to access and book products online. These could include: heritage passes, theatre tickets and online booking of tee-times.



Developing Enterprises

Fáilte Ireland expanded its range of support services for businesses in 2008. This included helping firms to improve their eBusiness capability and to get smarter at marketing and selling on the web as well as an on-site mentoring service with practical advice across a range of business issues.

In 2009, we will further expand these types of practical business supports - aiming to increase our scope and reach across the country. In particular, we will focus on the three all important “Cs” – cash, customers, and costs.

The Challenge

The business environment for Irish tourism enterprises has become much more difficult during the course of 2008 as costs continued to escalate in a climate of aggressive pricing and associated tightening margins. In many enterprises, labour now accounts for in excess of 40% of total costs, and local authority charges have risen sharply in some parts of the country. Food costs and energy costs have also continued to increase. The current indications are that the 2009 season will be as difficult if not more difficult than 2008 for the vast majority of tourism businesses, as overseas markets remain soft and individual enterprises strive to curtail costs in order to remain economically viable.

Accordingly, tourism enterprises need to review their business and operational capabilities.

Our Mission

During the course of 2008 a number of new business support services were developed and trialled to specifically help small businesses in this environment. These complemented an existing portfolio of services. The focus in 2009 will be to integrate these services further into a single recognisable and accessible programme of supports for small tourism businesses. In keeping with earlier initiatives, the key focus will be on local access and local service delivery.

Our Enterprise Development Support Services for 2009 are outlined in the following pages.

AREA	ACTION
E-BIZ SUPPORT	<ol style="list-style-type: none"> 1. Support 380 businesses to access and complete the Web-Check service, and a further 160 businesses to access and complete the Web-Build service. 2. Support 750 clients through the Web-Skills programme.
BUSINESS MENTORING	<ol style="list-style-type: none"> 1. Launch a mentoring service across all regions providing one-to-one business advice to tourism enterprises. This programme will also serve as a reference point to other complementary services available from Fáilte Ireland and so reinforce wider impacts across the industry.
ONLINE BUSINESS DIAGNOSTICS	<ol style="list-style-type: none"> 1. Expand and improve Performance Plus, the online business diagnostic tool currently used by 300 tourism businesses. The focus will be on enhanced functionality of the tool, strengthening links to mentoring activity, and increased uptake by smaller businesses in particular.
TOURISM DEVELOPMENT NETWORKS	<ol style="list-style-type: none"> 1. Introduce a new three-year cycle of local tourism development networks in 2009. The emphasis will shift from a uniquely county focus, to a focus on particular tourism themes and products.
PROFESSIONAL DEVELOPMENT	<ol style="list-style-type: none"> 1. Deliver a range of best-in-class training programmes and workshops to over 2,000 managers and supervisors ranging from finance and marketing to HR and operations as well as on-line business supports. 2. Drawing on well-established links with Cornell University in New York, the fifth Management Development Programme will be progressed and concluded in Spring 2009. In addition, three Alumni events will be organised. 3. The Foundation Level Tour Guide Programme (developed in 2008) will be delivered once again, in collaboration with the industry. The structure of the existing National Tour Guide Programme will be reviewed with a view to migrating it to an on-line environment.
CONTINUOUS BUSINESS IMPROVEMENT	<ol style="list-style-type: none"> 1. Optimus is Fáilte Ireland's business improvement service. In 2009, the number of enterprises working towards an Optimus award will be expanded by 10%. 2. A particular focus in 2009 will be to increase the visibility and uptake of Optimus in the non-accommodation sectors.

AREA	ACTION
QUALITY PROGRAMME	<ol style="list-style-type: none"> <li data-bbox="485 169 1430 225">1. Consolidate the newly developed on-line facility for self-assessment and classification in the self-catering sector.
MARKET POSITIONING	<ol style="list-style-type: none"> <li data-bbox="485 256 1469 344">1. Implement a focussed and comprehensive publicity and trade familiarisation programme with key international media and the travel industry to increase awareness and media coverage of the unique Irish tourism product. <li data-bbox="485 376 1430 464">2. Invest in a limited number of consumer and trade shows in core international markets which will provide Irish enterprises with cost-effective platforms to present their products to an international audience.
MARKET FACILITATION	<ol style="list-style-type: none"> <li data-bbox="485 499 1477 611">1. Manage a series of industry workshops to provide tourism enterprises with opportunities to present their products to relevant targeted international buyers and distributors; these workshops will include specific events for industry from North America, Eastern Europe, Germany and the UK. <li data-bbox="485 651 1465 738">2. Optimise the investment in the national "Meitheal" Workshop, with a focus on showcasing the best of Irish products, and maximising the opportunities for tourism enterprises to network with international customers.





Developing People

Dedicated and skilled staff can make a critical difference to the prospects of any tourism enterprise. In 2009, as we face more difficult times, the recruitment and retention of skilled and professional employees will be as important as ever.

Fáilte Ireland recognises this and will continue to promote tourism as a career and trained staff as the key to providing a quality service.

The Challenge

An important element in delivering value for money in the tourism sector is the skills of the staff working in the industry. This is clearly evident in the front-line staff who deal with customers on a daily basis. These staff members are effectively the channel through which the “customer experience” is delivered. The contribution of highly skilled staff is just as important in less visible production functions such as food preparation and room servicing.

Therefore, we need to identify skills gaps, where they exist, and provide for the right training and education to help fill those gaps. This is a central element in the set of business supports provided by Fáilte Ireland.

Our Mission

In 2009, the key issues which we will address include continued support for accredited craft skills training. In particular, there will be an increased emphasis on supporting part-time and block-release programmes.

Customer service skills will continue to be a key focus for us in 2009. Following a very successful initiative launched in 2008, which involved Fáilte Ireland Instructors providing customer service training for front-line staff on-site at their place of work, this programme will be repeated and expanded in 2009. This work-based training delivery represents an innovative response to industry needs, and complements the more established training programmes which continue to be available at Fáilte Ireland’s four permanent Training Centres.

Our Education and Training Services for 2009 are outlined in the following pages.

AREA	ACTION
SKILLS TRAINING - DIRECT PROVISION	<ol style="list-style-type: none"> 1. Provide on-site customer care training to 3,200 staff working in front-line positions. 2. Through Fáilte Ireland Training Centres, provide accredited training programmes in the core skills areas of culinary, bar and restaurant service (610 participants). 3. Through regionally located outreach facilities, provide accredited training programmes in the core skills areas of culinary, bar, and restaurant service (700 participants). 4. Through regionally based outreach facilities, provide short- burst upskilling for 500 front office staff. 5. Develop further the Accreditation of Prior Learning (APL) process as a mechanism for progressing the accreditation of workers in the industry. 6. In partnership with the hotel sector and tour operators, provide on-site advice and training for chefs catering for the coach tour market.
SKILLS TRAINING – COLLEGE PROVISION	<ol style="list-style-type: none"> 1. Support 1,300 students attending tourism and hospitality programmes at ten Institutes of Technology around the country, (1,300 students taking craft skills courses). 2. Support 600 students attending the part-time National Apprenticeship Programme at Institutes of Technology around the country (culinary and bar skills courses). 3. Support 60 students attending the Trainee Management Development Programme at Galway-Mayo Institute of Technology and Waterford Institute of Technology.

AREA	ACTION
CAREERS PROMOTION	<ol style="list-style-type: none"> 1. A new on-line social networking site promoting careers in tourism, and designed for users in the 15-18 age range, will be launched in January. The launch will be supported by an advertising campaign using on-line and mobile phone media. 2. Increase the number of secondary school students taking tourism courses to 4,600. 3. Review and rebrand the annual "Get a Life" magazine.
MANAGEMENT EDUCATION AND RESEARCH	<ol style="list-style-type: none"> 1. In partnership with the colleges, identify and fund relevant research programmes targeting aspects of tourism policy and management.
EDUCATOR DEVELOPMENT	<ol style="list-style-type: none"> 1. Develop and launch a "Lecturer into Industry" scheme with a target of 25 participants. This scheme will enable college lecturers in tourism and hospitality to re-visit the workplace and update their operational skills. 2. Repeat the Educators Development Programme (first delivered in 2007), with a target of 25 participants.





Developing Locally...Selling Locally

As a national body, Fáilte Ireland takes a strategic overview when promoting the development of tourism. This includes ensuring that we develop all our regions and maximise the potential of tourism in all parts of Ireland.

The home market remains a strong factor in underpinning the sustainability of many tourism businesses. In 2009, we will continue to energetically drive domestic demand for a holiday at home with a comprehensive range of marketing strategies. No opportunity will be ignored in 2009 to sell the benefits of an Irish break. We will also continue to invest in regional marketing across key overseas markets in conjunction with Tourism Ireland.

The Challenge

The strong growth of recent years in the domestic market, now accounting for the largest part of business in the majority of enterprises, has somewhat evened out in 2008. A further contraction in economic activity and a tightening of disposable income is likely to lead to a decline in holiday spending in 2009. However, an opportunity exists to present Ireland to its own people as a convenient, good value alternative to an international holiday in 2009.

Our Mission

Fáilte Ireland will continue the implementation of its three year regional tourism development strategies with the publication of the “year two” operations plan. Our investment in driving the Home Holidays market levels will remain high, with a sharper focus on both convenience and value.

In the international arena, we will work in close partnership with the carriers, airports, and regional industry to design and invest in targeted programmes which identify best prospects, focusing on key access routes overseas, in collaboration with Tourism Ireland.

Our Regional Development Services for 2009 are outlined in the following pages.

AREA	ACTION
REGIONAL STRATEGIES AND PLANS	<ol style="list-style-type: none"> 1. Support and drive the implementation of the 2008- 2010 development plan for each region. Key focus areas for each region include: <ul style="list-style-type: none"> • South West: Develop potential of business tourism, and activity-based holidays • West: Develop the outdoor and adventure propositions • East Coast Midlands: Develop Lakelands and heritage products • North West: Continue development work on key iconic attractions and outdoor pursuits infrastructure • South East: Develop heritage and culture, and family propositions
DRIVING DOMESTIC DEMAND	<ol style="list-style-type: none"> 1. Invest in “Discover Ireland” as the primary consumer brand for the marketing of Ireland as a holiday destination to Irish people and manage a year-round marketing communications programme incorporating television, radio, press and outdoor channels. Key messages in the 2009 campaign will be the convenience and value of holidaying at home. 2. Partner with relevant private and public sector stakeholders to add weight and resources to the national communications programme by focusing on specific motivational experiences in each region. 3. Maximise the opportunity presented by the myriad of festivals and events throughout the country to drive demand by positioning festivals as a central element of the home holidays programme. A particularly acute focus will be on the flagship events, namely Volvo Ocean Race, World Rally Championship, and the Ladies Irish Open. 4. Publish the Discover Ireland magazine and launch a new series of monthly promotional magazines which will be distributed widely to drive awareness of, and interest in, taking a break at home. 5. Continue to increase the focus on publicity and step up the presence of home holidays in the national media. 6. Increase the focus on the potential presented by the Northern Ireland market by launching a more aggressive, targeted campaign in 2009.
TACTICAL OVERSEAS MARKETING	<ol style="list-style-type: none"> 1. Create a specific focus on the opportunities presented by sea access and work in partnership with relevant stakeholders to create specific car touring marketing programmes in the UK and France.



Developing Greener Tourism

An environmental approach to tourism is not only an ethical choice but also a business necessity. As a nation, we sell ourselves as a “green” country. Visitor expectations of unspoilt landscapes and a green environment are part of the attraction that lures many to our shores.

However, it is not just a matter of image.

An environmental approach has the potential to yield cost-savings for tourism businesses – an important consideration given the challenges we face in the year ahead.

The Challenge

Fáilte Ireland is entering the third year of its Environmental Action Plan 2007-09, which sets out the environmental challenges facing the tourism industry and a plan of action to address them. Key challenges for 2009 include the spiralling cost of energy, water and waste management, and the deterioration in water quality in certain parts of the country. Failure to address these issues will undermine Ireland's credibility as a clean, green destination.

Our Mission

A key priority for us in 2009 will be to help tourism businesses reduce their consumption of energy and water, and assist them in managing waste more efficiently. This has the potential to make a significant reduction in the cost of these utilities. In addition, Fáilte Ireland will focus on the protection of key tourism assets, particularly water-based assets, through its role as a prescribed body in the planning process. During 2008, Fáilte Ireland published a Carbon Strategy outlining a number of actions to be taken relating to climate change and carbon emissions. These actions will be implemented in 2009.

Our Environmental Activities for 2009 are outlined in the following pages.

AREA	ACTION
PLANNING	<ol style="list-style-type: none"> 1. Make submissions to 8 Local Authority Development Plans. 2. Make submissions to approximately 75 planning applications. 3. Promote the application of Strategic Environmental Assessment to relevant tourism plans and programmes. 4. Input to all 8 River Basin District Management Plans.
ENVIRONMENTAL MENTORING	<ol style="list-style-type: none"> 1. Offer an environmental mentoring service to tourism businesses participating in the Business Mentoring Programme to assist in reducing the cost of energy, water and waste.
CARBON STRATEGY	<ol style="list-style-type: none"> 1. Contribute to the Government's Change campaign. 2. Continue to measure and reduce the carbon footprint of the tourism industry. 3. Profile environmentally friendly tourism businesses on the Discover Ireland website.
GOOD PRACTICE	<ol style="list-style-type: none"> 1. Disseminate environmental good practice advice on festivals, cruising and golf. 2. Develop environmental good practice guidelines for conference facilities and organisers. 3. Implement STRIVE project on the sustainable management of tourism destinations in association with the EPA.
POLICY AND RESEARCH	<ol style="list-style-type: none"> 1. Conduct a survey of visitor attitudes to rural housing in Ireland. 2. Contribute to the preparation of a National Landscape Strategy by the Department of the Environment, Heritage and Local Government. 3. Undertake tourism proofing of transport and infrastructure policy. 4. Continue research on the sustainable development of holiday homes.
TOURIST SIGNAGE	<ol style="list-style-type: none"> 1. Prepare a National Tourist Signage Strategy in association with the Department of Transport, the National Roads Authority and the County and City Managers Association. 2. Liaise with the National Roads Authority on its National Signage Improvement Programme.



Developing a Voice for Tourism

Tourism is a complex sector with a multiplicity of businesses and interests involved – many of them small individual enterprises. As a national authority, Fáilte Ireland is committed to giving all these players a voice on the public stage.

An authoritative voice comes from an authoritative grasp of the relevant facts. Fáilte Ireland will continue with its research role to establish the facts on the ground and to communicate the realities within the tourism sector throughout 2009.

The Challenge

Tourism exists in a busy cross-cutting policy and agency environment where the decisions and actions of others will routinely impact on the wellbeing of the industry. Unlike other sectors, the fragmented nature of the tourism industry means that individual firms can often lack the scale and resources to undertake research and to articulate a view on matters of concern in the wider economy.

Our Mission

Through the conduct of research, and the integration of the subsequent findings into rigorous policy analysis, Fáilte Ireland will develop and maintain a capability to advocate a pro-tourism position as a contribution to the development of public policy.

A key issue in 2009 will be to provide the industry with information and insights that will contribute towards sustainability and competitiveness in a difficult trading environment. The annual research programme will be reviewed to ensure our work continues to ask the right questions and to meet industry needs. Ongoing research programmes will be adapted to reflect the current business environment and new research programmes will be initiated in response to industry requirements. This work will support Fáilte Ireland's advocacy role, and assist in building capacity to contribute to public debate.

The 2009 activities of our Research and Policy Division for are outlined in the following pages.

AREA	ACTION
POLICY ANALYSIS - ECONOMIC	<ol style="list-style-type: none"> 1. Undertake regional and local area economic modelling to facilitate measurement of tourism's economic impact at local level. 2. Conduct an analysis of the tourism labour market that will include a student tracking study for those entering skilled-level jobs in the tourism industry, and an analysis of wage levels by key skills areas. 3. Economic analysis of the domestic tourist, with particular reference to spending patterns in Ireland and abroad.
POLICY ANALYSIS	<ol style="list-style-type: none"> 1. An analysis of issues relating to improving the accessibility of cultural heritage to visitors. 2. An analysis of the implications of demographic change, both national and internationally on Irish tourism.
POLICY ANALYSIS - OCCASIONAL PAPERS	<ol style="list-style-type: none"> 1. Prepare and publish a number of policy papers summarising principal findings and policy implications arising from the research and analysis work conducted through 2009.
ECONOMIC IMPACT STUDIES	<ol style="list-style-type: none"> 1. Undertake Economic Impact Studies on major signature events to include the World Rally Championship and the Volvo Ocean Race.
RESEARCH REVIEW	<ol style="list-style-type: none"> 1. Carry out a review of the existing portfolio of annual research programmes to ensure that they continue to address issues of relevance to the industry and to provide data needed by Fáilte Ireland under the National Development Plan. The review will include updating current studies to reflect the new business environment and initiating new studies reflecting the needs of both internal and external stakeholders.
RESEARCH - VISITOR SATISFACTION	<ol style="list-style-type: none"> 1. Conduct research among overseas and domestic visitors through the Visitor Attitudes Survey, the Domestic Holiday Survey and through further research on customer service delivery and facilitation.

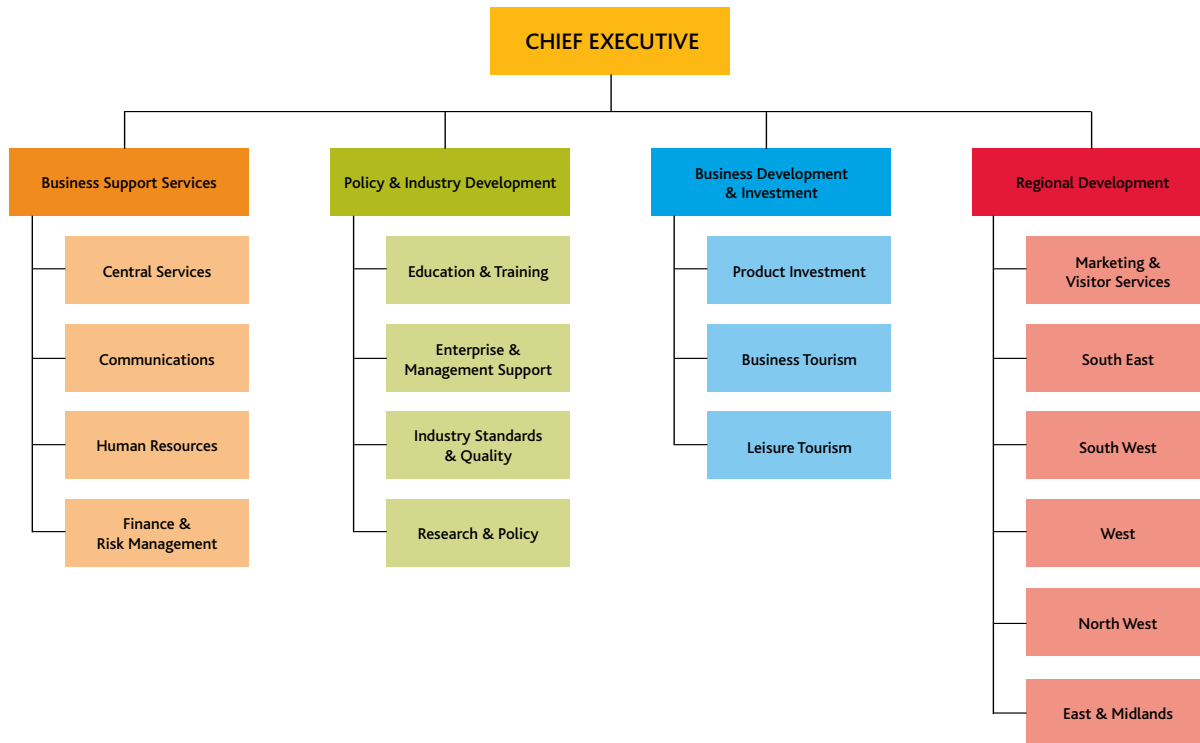
AREA	ACTION
RESEARCH – VISITOR PROFILING	1. Conduct research among overseas and domestic visitors through the Survey of Overseas Travellers and the Domestic Holiday Survey.
RESEARCH – BUSINESS BENCHMARKING	<ol style="list-style-type: none"> 1. Carry out business to business research through the Hotel Survey, the Other Accommodation Occupancy Survey, the Tourism Barometer Survey, and through sector specific surveys in the activity and cultural/heritage sectors. 2. Implement Business Tourism Monitor, a survey designed to measure the volume and value of Meetings, Incentives, Conferences and Exhibitions (MICE).
RESEARCH – EMPLOYMENT & TRAINING	1. Conduct the Tourism Training and Employment Survey to provide details of employment numbers in the hospitality sector, profile the key characteristics of employees, and identify training needs.





Our Structure

Fáilte Ireland was established under the National Tourism Development Authority Act in 2003 to guide and promote tourism as a leading indigenous component of the Irish economy. The organisation operates in four main areas (see chart below) providing strategic and practical support to develop and sustain Ireland as a high-quality and competitive tourist destination.



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