

# Ireland's Hidden Heartlands Regional Roadshow

24<sup>th</sup> February 2023



# Agenda



## 2022 in Review and 2023 Outlook

## Developing the Region

- Regional Tourism Strategy and Destination Plans
- Development Projects
- Enterprise Supports

## Promoting the Region

## Providing Routes to Market

# Running Order



**Paul  
Keeley**

Director,  
Regional  
Development



**Paddy  
Mathews**

Head of  
Ireland's  
Hidden  
Heartlands



**Fiona  
Monaghan**

Head of  
Product  
Development



**Aileen  
Deasy**

Manager,  
Enterprise  
Development



**Kathrin  
Chambers**

Manager,  
Digital  
Marketing



**Martin  
Donnelly**

Manager,  
Commercial  
Development





Paul Keeley  
Director, Regional  
Development



Fáilte  
Ireland

DRIVING  
SUSTAINABLE

*Recovery*



# Topics

---



- 1 National Highlights – 2022
- 2 2023 Outlook
- 3 Regional Outcomes & Perspectives





## Section 3:

# 2022 Review

- Overseas
- Domestic



# Overseas Market - Fast Recovery



- Progressive recovery in total inbound arrivals
- Continental Europe led the recovery
- Q3/4 good return of North American visitors.
- Great Britain was more challenged



Jan - Dec Arrivals	2022 v 2019
Great Britain	-21%
Mainland Europe	-8%
North America	-20%
Other Long Haul	-15%
<b>Total</b>	<b>-14%</b>

# Domestic Market - Strong Performance



January to September 2022 vs 2019:

10.2 million total trips +14% 

Holiday trips + 19% 

Holiday nights + 21%. 

Domestic holidays increased  
share of total trips by Irish  
residents to

51% in 2019

**57% in 2022**



# 2023 Outlook

- Demand side opportunities
- Supply side challenges
- Sustainability targets



Fáilte  
Ireland



Ireland's Hidden  
HEARTLANDS



# 1. Demand Side Opportunities



## Opportunities in Overseas Market: Air Access Forecast 2023

Changes in Seat Capacity	Summer 2023 vs. 2019
Great Britain	+2%
Mainland Europe	+4%
North America	-2%
Rest of World	+8%
All Markets	+3%

# 1. Demand Side Opportunities

---



## Positive Domestic 2023 Outlook

- Consideration for taking a domestic trip in 2023 is 82% on par with 2019
- 23% intend to take a break in the next 3 months
- Visitor satisfaction high at 79%
- Value for money critical for domestic



# Supply Side Challenges



Fáilte  
Ireland



Ireland's Hidden  
HEARTLANDS





# Supply Side Challenges

---



1. Rising Operating Costs
2. Accommodation Capacity
3. Staffing
4. Car Hire
5. Value for Money



1. Pressure on margins
2. Price pressure/lost business
3. Pressure to maintain standards
4. Regional mobility impacted
5. Long-term reputational risk

# Government Contracts



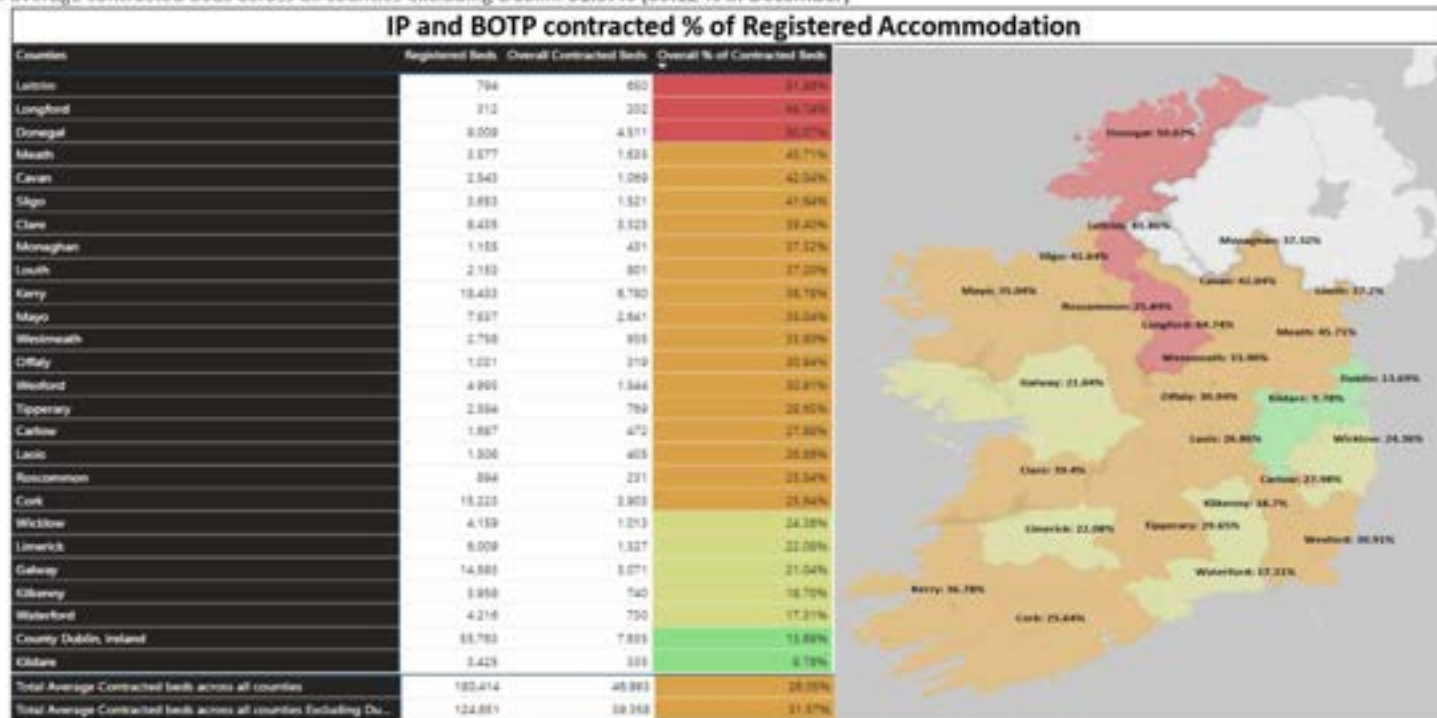
## Combined IP and BOTP contracted beds in all Fáilte Ireland registered accommodation

The graphic below details the percentage of IP and BOTP contracted beds in Fáilte Ireland registered accommodation.

For comparison purposes, the relative positions this month and last month are as follows:

Total average contracted beds across all counties: 26.05% (25.19 % in December)

Total average contracted beds across all counties excluding Dublin: 31.57% (30.12 % in December)



# Sustainability Targets



# Sustainability Targets

---



- Government Commitment to carbon neutrality no later than 2050
- Sector target is a 35% reduction in emissions by 2030
- Collective effort from every business and stakeholder





# A Closer Look At Regional Performance



# VICE Framework

---



- **Visitor:** Destination Attitude Survey
- **Industry:** Barometer, Occupancy and Rate
- **Community:** Tourism Approval Rating
- **Environment:** SEA/Environmental Monitoring





**VISITOR**

# Destination Attitude Survey



**Fáilte  
Ireland**



**Ireland's Hidden  
HEARTLANDS**



# Visitor Destination Attitude Survey

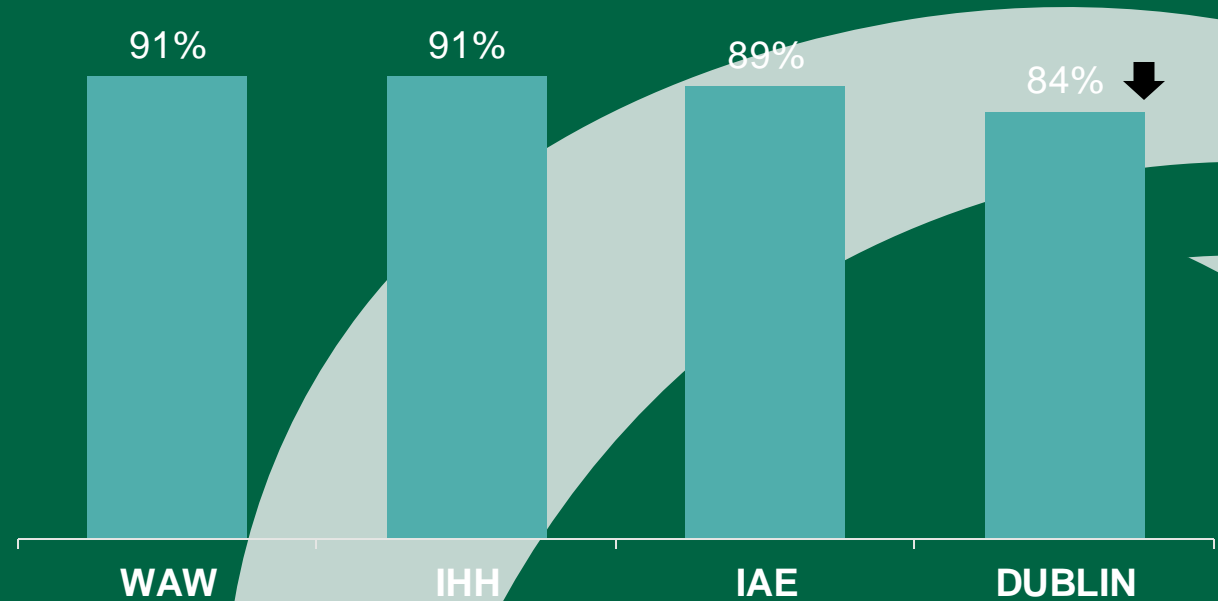


8,283 interviews across 56 locations between July and September 2022  
Visitor satisfaction is exceptionally high, indicating experiences are delivering against expectations.

“**VERY SATISFIED**”  
(6 or 7 on 7pt scale)

**90%**

Base: 8283  
Q.17 To date, how satisfied are you with your trip to this area?







## Ireland's Hidden HEARTLANDS

- Visitors to IHH has positive experiences, matching or beating the national average for trip satisfaction and VFM.
- Visitor movement is least evident in IHH, indicating less touring and more fixed stays. However, the extent of visitor movement above the Dublin Galway line may highlight potential for partnership with the northern regions of WAW.
- Available range of activities are key development areas – whether these be in the evening, outdoor or sightseeing. Supporting existing attractions and activities with information within destinations is also important.



INDUSTRY

# Industry Sentiment



# Plenty of Optimism



**68%**

Volume of 2022  
business up on 2021

**57%**

2022 Volume better or  
equal to 2019 levels

**74%**

Believe 2023 will surpass or  
match 2022 volume

**82%**

Costs are greatest concern



**INDUSTRY**

# Occupancy and Rates



**Fáilte  
Ireland**



**Ireland's Hidden  
HEARTLANDS**



# Fáilte Ireland Hotel Performance

## Year to Date December 2022



	Occupancy			Average Daily Rate			RevPAR		
	2022	2019	Variance 2022 vs 2019	2022	2019	Variance 2022 vs 2019	2022	2019	Variance 2022 vs 2019
National	73	77	-4 ppts	160	128	25%	117	98	19%
Westmeath **	73	76	-3 ppts	133	91	46%	97	69	41%

\*\*Minimum sample size



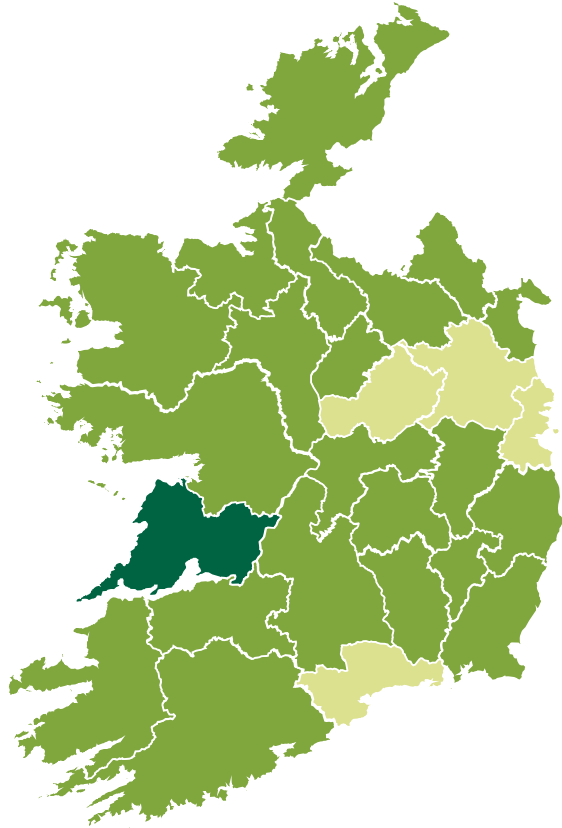
**COMMUNITY**

# Tourism Approval Rating





# International Tourism



↑↓ Shows change from Apr - Sep 2021



Region	TAR Score
Mid-West	73
Border	71
South-West	67
Mid-East	67
West	67
South East	66
Midlands	63
Dublin	59

County	TAR Score
Clare	80
Kildare	77
Longford	75
Kilkenny	74
Donegal	72
Monaghan	72
Tipperary	72
Leitrim	72
Limerick	70
Cavan	70
Sligo	68
Mayo	68
Offaly	68
Wicklow	68
Cork	67

County	TAR Score
Roscommon	67
Kerry	67
Wexford	67
Galway	66
Carlow	65
Louth	61
Laois	60
Dublin	59
Meath	59
Waterford	57
Westmeath	57
None	
None	
None	

- Advocacy
- Approval
- Acceptance
- Limited Acceptance
- Threatened Acceptance
- Disapproval
- 

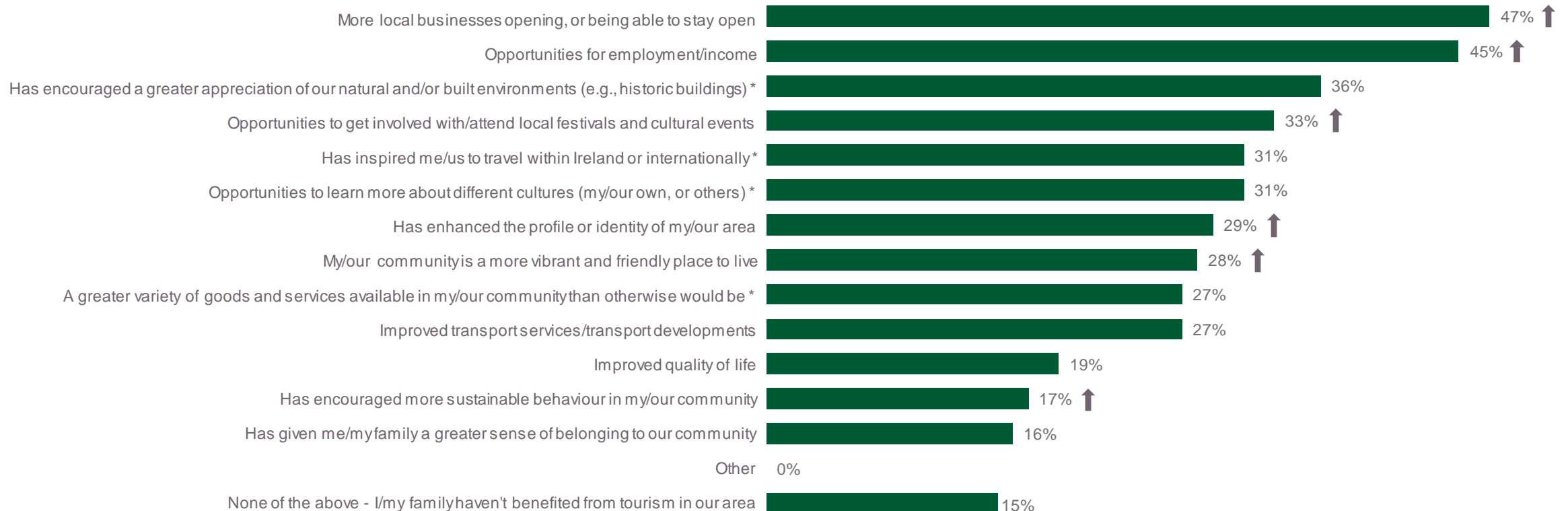
(Base: Apr 2022 - Sep 2022 - Irish residents n=1,771)

Caution: all counties except Cork, Donegal, Dublin and Galway have a low sample size

# Benefits from tourism activity in local area



In which of the following ways, if any, would you say you/your family benefit from tourism activity in your local area?



The (↑/↓) indicate statistically significant differences vs Apr – Sep 2021 at 95% confidence level

(Base: Apr 2022 - Sep 2022 – Irish residents n=1,771)


\* Answer added in Q4 2021 - significant difference test not possible

# Ensuring tourism benefits Irish communities

## What more, if anything, do you think could be done to ensure tourism benefits communities in Ireland?



Growing Tourism	35%
Increase promotion of individual Irish counties	13%
Create new attractions and activities	8%
Greater investment/funding for county development	7%
More events and festivals	4%



Infrastructure	23%
More public transport	9%
Infrastructure development (generally)	7%
Better overall transport solutions	5%
More roading	3%



Community Focused	35%
Reduce costs of living (including domestic travel)	15%
Increase provision of local facilities	7%
Community beautification	5%
Greater celebration of Irish culture, language and heritage	3%
Encouraging residents (and tourists) to support local	3%



Managing Tourism	7%
Public consultation and collaboration	3%



Tourism Accommodation	11%
Cheaper accommodation options	8%
More/greater diversity of accommodation options	4%



ENVIRONMENT

# Environmental Sustainability



# Environmental Sustainability

---

- Environmental Monitoring Plan – all regions
- SEAs – Regional Strategies & DEDPs
- Reducing Businesses' Carbon Footprint
  - Climate Action Roadmap
  - Business Capability Toolkits
  - Carbon Calculator



# Industry Recovery Strategy





# 7 Areas of Transformational Change

---



Sustainable Business Recovery



Supporting Tourism Careers



Accelerate Domestic Tourism



Opening the Outdoors



Industry Digitalisation



Destination Development and Distribution



Driving Climate Action



Paddy Mathews  
Head of Ireland's  
Hidden Heartlands



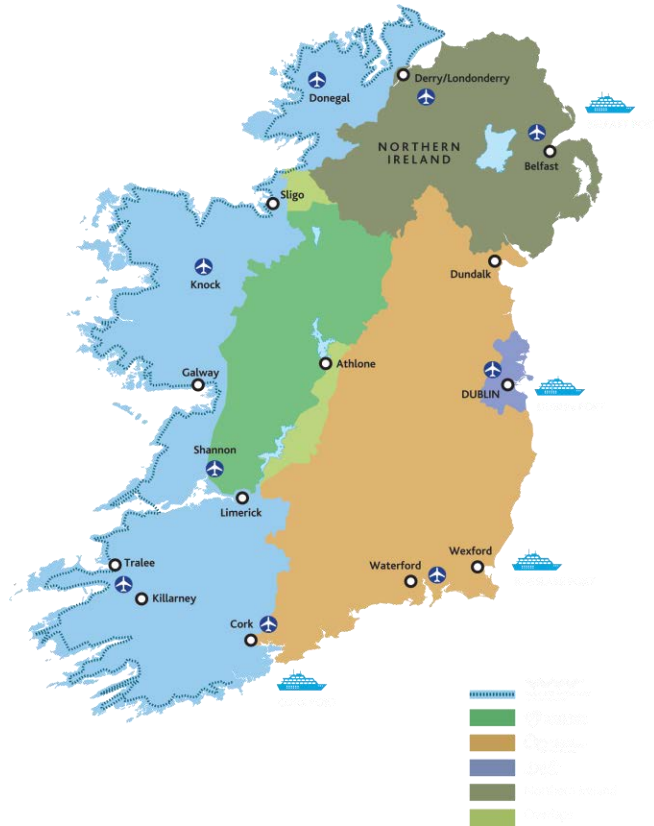
Fáilte  
Ireland

DRIVING  
SUSTAINABLE

*Recovery*



# Regional Geography





# Ballyhoura Joins Ireland's Hidden Heartlands



# IHH County Boundary Signage



1. To raise awareness of the Hidden Heartlands brand and to reinforce the association of particular counties and destinations with the brand.
2. Focusing on the newly included areas of Cavan, Westmeath, Offaly Tipperary and the Ballyhoura area in East Limerick & North Cork.
3. 89 new Ireland's Hidden Heartlands (IHH) county boundary signs on the relevant National and Regional roads in the above counties.

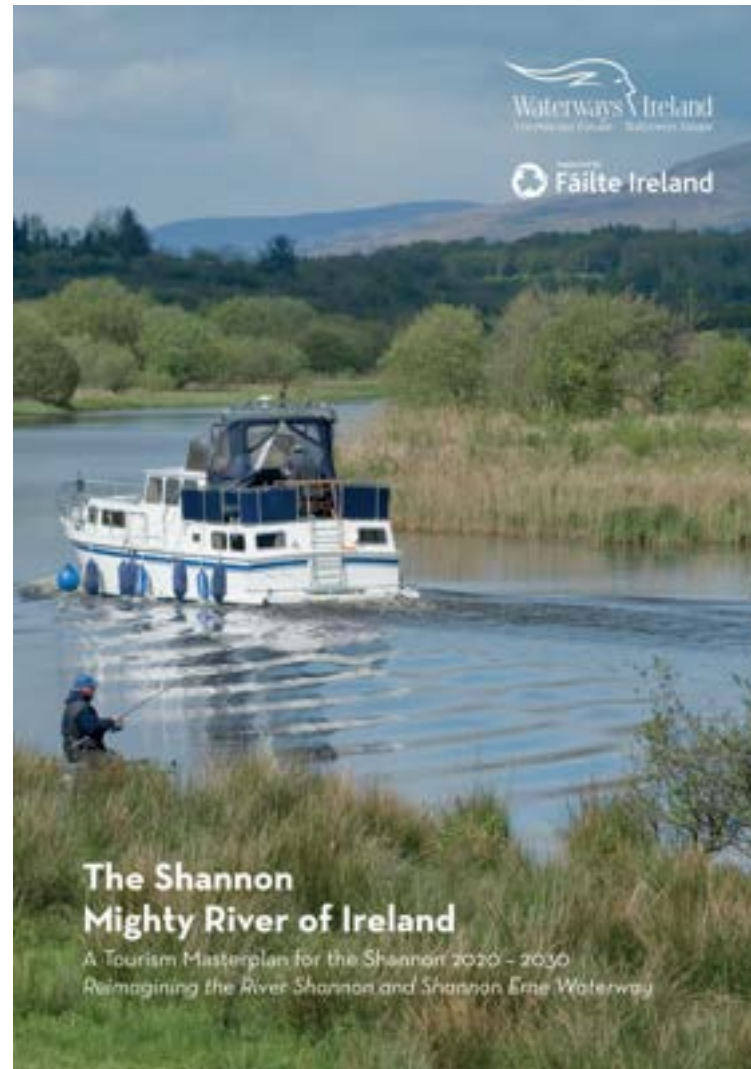
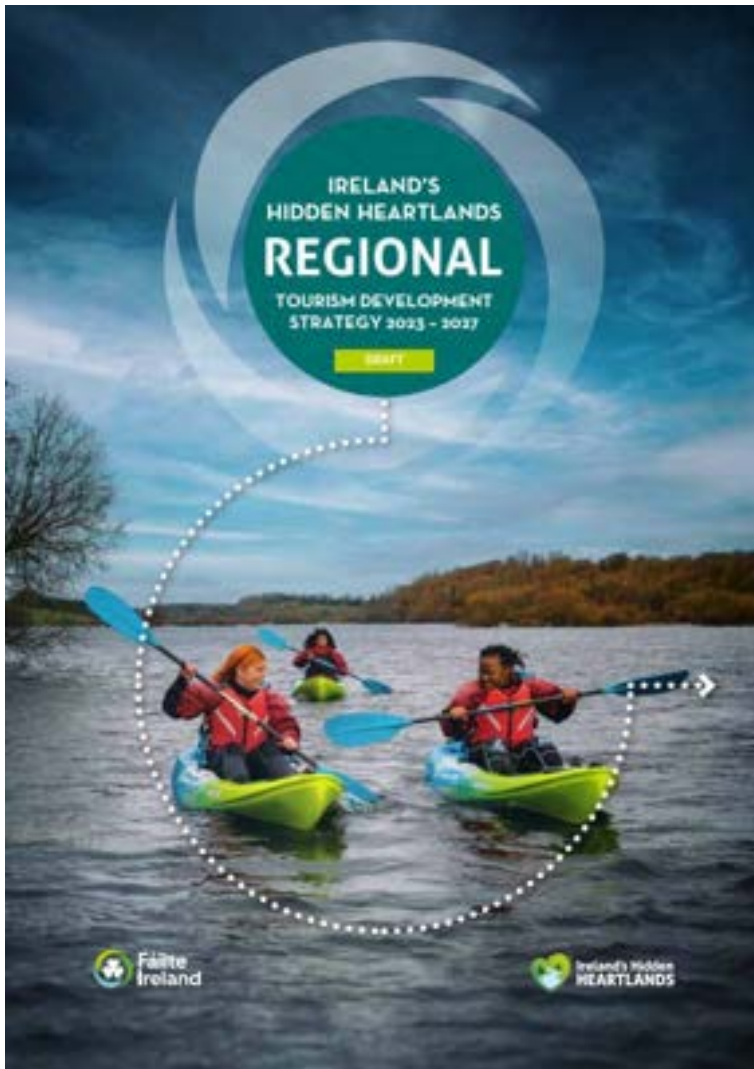


Example of installation



**Project timeline:** Expected finish date in Q2

# Regional Tourism Strategy 2023-2027



## Shannon Tourism Masterplan 2020-2030



# Vision to 2032

---



Ireland's Hidden Heartlands is:

...one of Europe's leading regenerative tourism destinations, where tourism works to create flourishing places and thriving communities.

...a place where the visitor has easy River Shannon and a well-connected web of Greenways, Blueways, and walking trails, with easy access to the outdoors.

...renowned for fun-filled days and relaxing, cosy evenings.

...a place where visitors can reconnect with nature as well as taking time out to reconnect with family and friends.

...a place here visitors can uncover intriguing heritage and cultural gems.

...well known for its wellness qualities and experiences.

...highly valued for its special environmental qualities and biodiversity.

# 5 Strategic Objectives

---

1

Raise awareness and recognition of the region and brand among domestic and international visitors and increase the duration of visitor stays, particularly within the domestic market.

2

Enhance the range and quality of our visitor experiences to underpin the Hidden Heartlands brand proposition, leveraging the natural and cultural assets of the region in a sustainable way with a focus on ecotourism.

3

Grow the economic impact of tourism and create jobs in local tourism by supporting the tourism industry (private, public and community sectors) to develop its capacity and capability.

4

Establish the region as one of the leading regenerative tourism destinations in Europe with nature and community at its heart.

5

Build a committed industry and stakeholder coalition to guide and co-ordinate the sustainable development of destinations across the region.

# Destination & Experience Development Plans





# Destination & Experience Development Plans

---



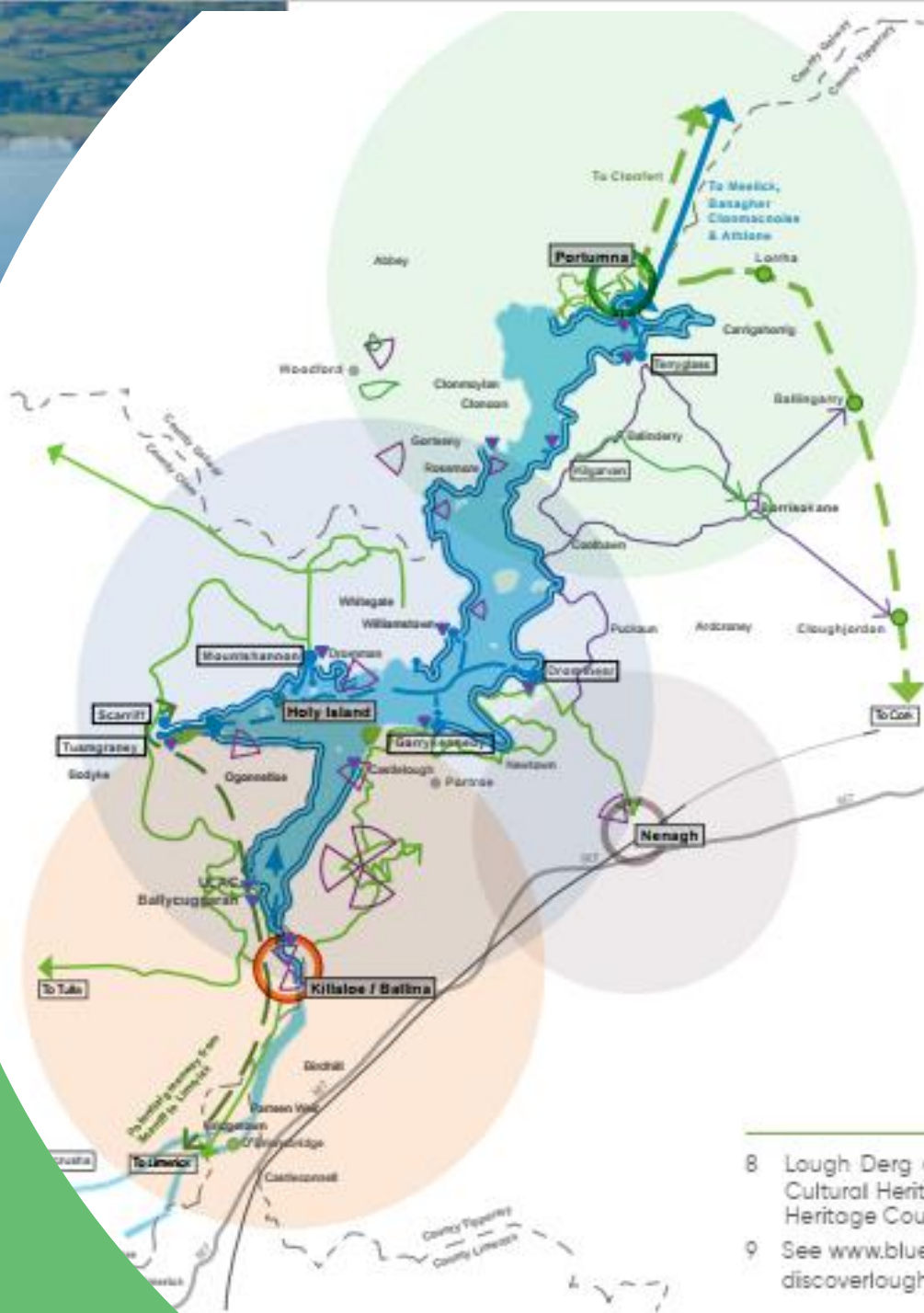
1. Lough Derg DEDP (launched)
2. Upper Shannon, Shannon-Erne & Border DEDP (in prep)
3. Mid Shannon & Midlands DEDP (start late 2023)
4. East Galway DEDP (start late 2023)
5. Ballyhoura DEDP (start late 2023)



# Lough Derg DEDP







“visitors need to know the proximity of places to each other, a sense of destination”

“encourage people to stay in an area – clustering”

“hubs around the lake”



# Upper Shannon, Shannon-Erne & Border DEDP



Covering Cavan, Leitrim and North Roscommon

- Audit of current and planned projects
- Stakeholder and asset mapping
- Benchmarking through mystery shops of current visitor offer, and audit of digital profile

# Upper Shannon, Shannon-Erne & Border DEDP



Timeline:





## Fáilte Ireland Destination and Experience Development Plan

### Tourism & Community Consultations: Share Your Thoughts

Fáilte Ireland is developing a five-year tourism destination and experience plan that will include Cavan, Leitrim and North Roscommon as part of the development of the Ireland's Hidden Heartlands region.

We are inviting community groups, businesses, local organisations and interested individuals to an event to hear about this plan and share your views on the potential for tourism within your community.



- 1 **Tue, February 21<sup>st</sup>**
- 2 **Wed, February 22<sup>nd</sup>**
- 3 **Thu, February 23<sup>rd</sup>**
- 4 **Tue, February 28<sup>th</sup>**
- 5 **Tue, March 14<sup>th</sup>**
- 6 **Wed, March 15<sup>th</sup>**



- Strokestown Park House & Gardens**, Co. Roscommon
- Osta W8 Café & Restaurant**, Manorhamilton, Co. Leitrim
- Bailieborough Courthouse**, Co. Cavan.
- Arigna Mining Experience**, Arigna, Co. Roscommon
- Mohill Library**, Mohill Co. Leitrim
- Slieve Russell Hotel Golf & Country Club**, Ballyconnell, Co. Cavan



- 7pm**
- 7pm**
- 8pm**
- 7pm**
- 7pm**
- 7pm**

How do I register:

Please email [DEDP\\_UpperShannon@failteireland.ie](mailto:DEDP_UpperShannon@failteireland.ie) to register to attend



# Mid-Shannon and Midlands DEDP

---



DEDP for Mid-Shannon and Midlands (South Roscommon, Offaly, Longford & Westmeath) will commence latter half of 2023

# East Galway DEDP

---



DEDP for East Galway DEDP will commence late 2023

# Ballyhoura DEDP

---



DEDP for Ballyhoura will commence late 2023



# Collaboration



Fáilte  
Ireland

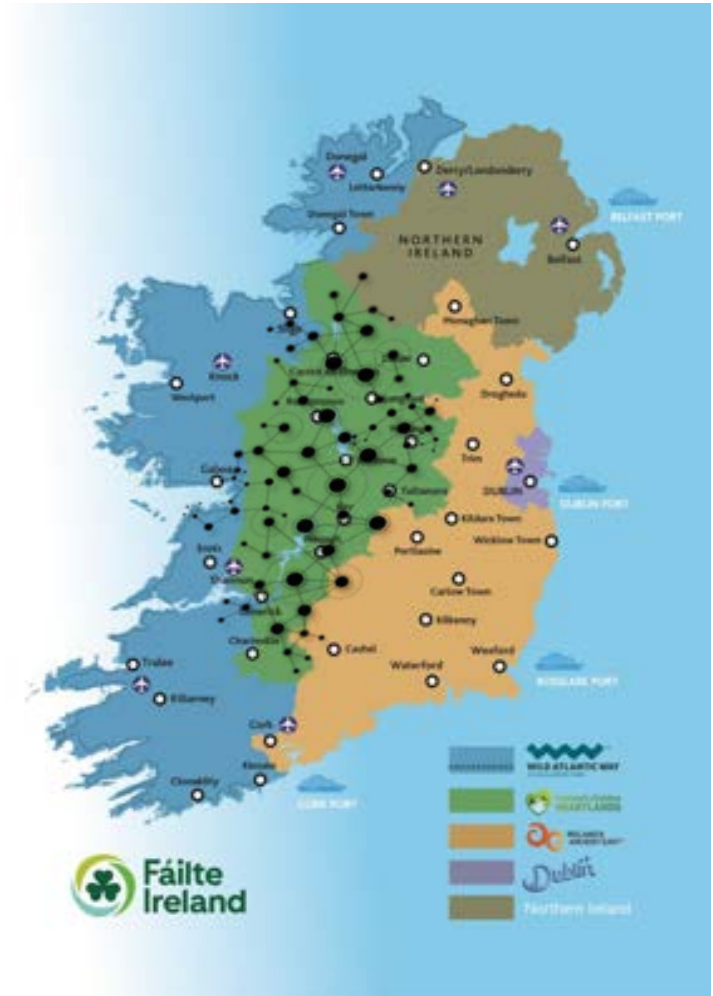
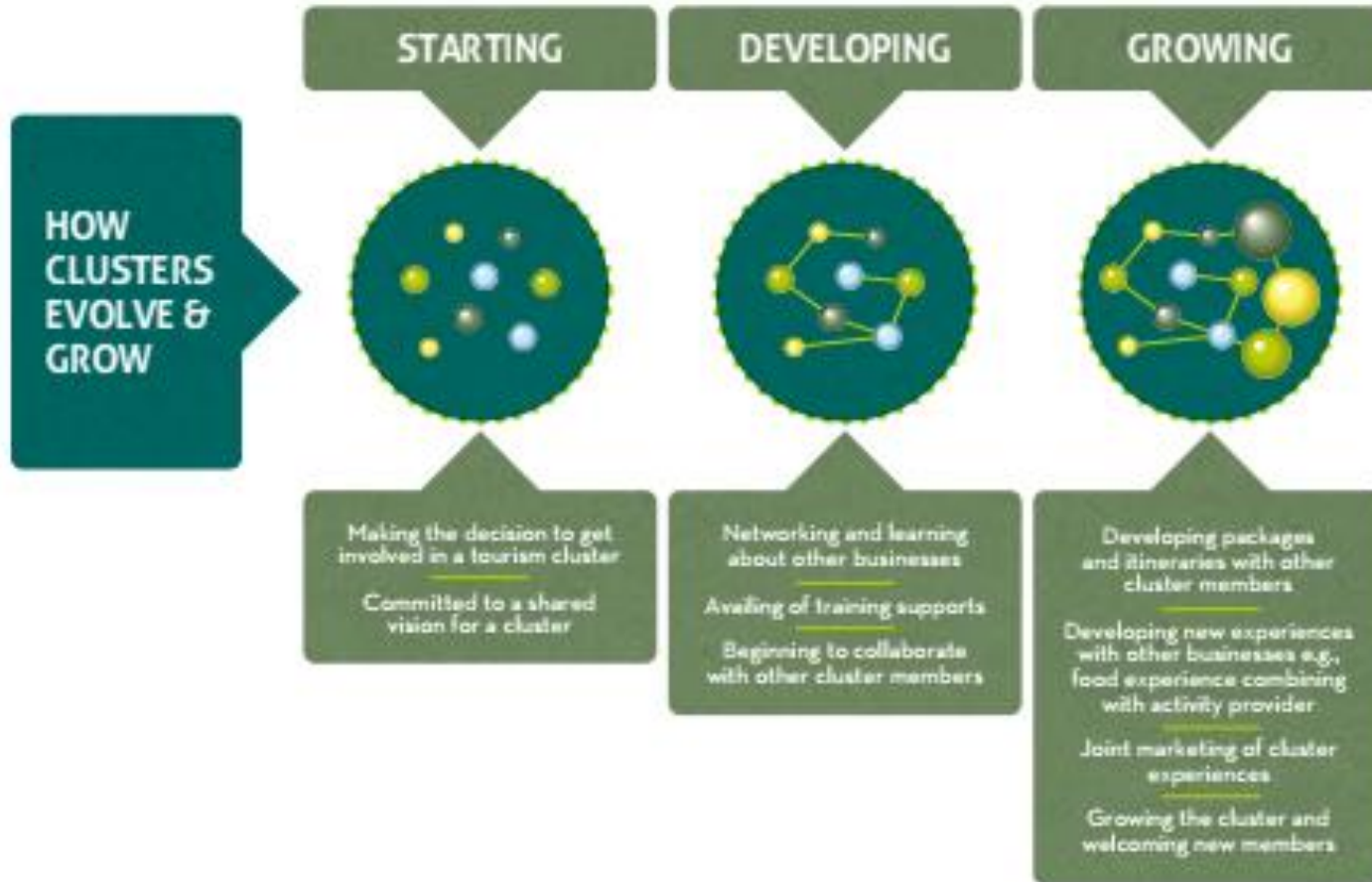


Ireland's Hidden  
HEARTLANDS





# Building networks and clusters





# Networking Event 24th May 2022



78  
Businesses  
attended





# Royal Canal and Greenways Activation



SAVE THE DATE

## Connecting your business to the Royal Canal Greenway

Date: Tuesday, 31 January 2023

Time: 09:30 – 14:00

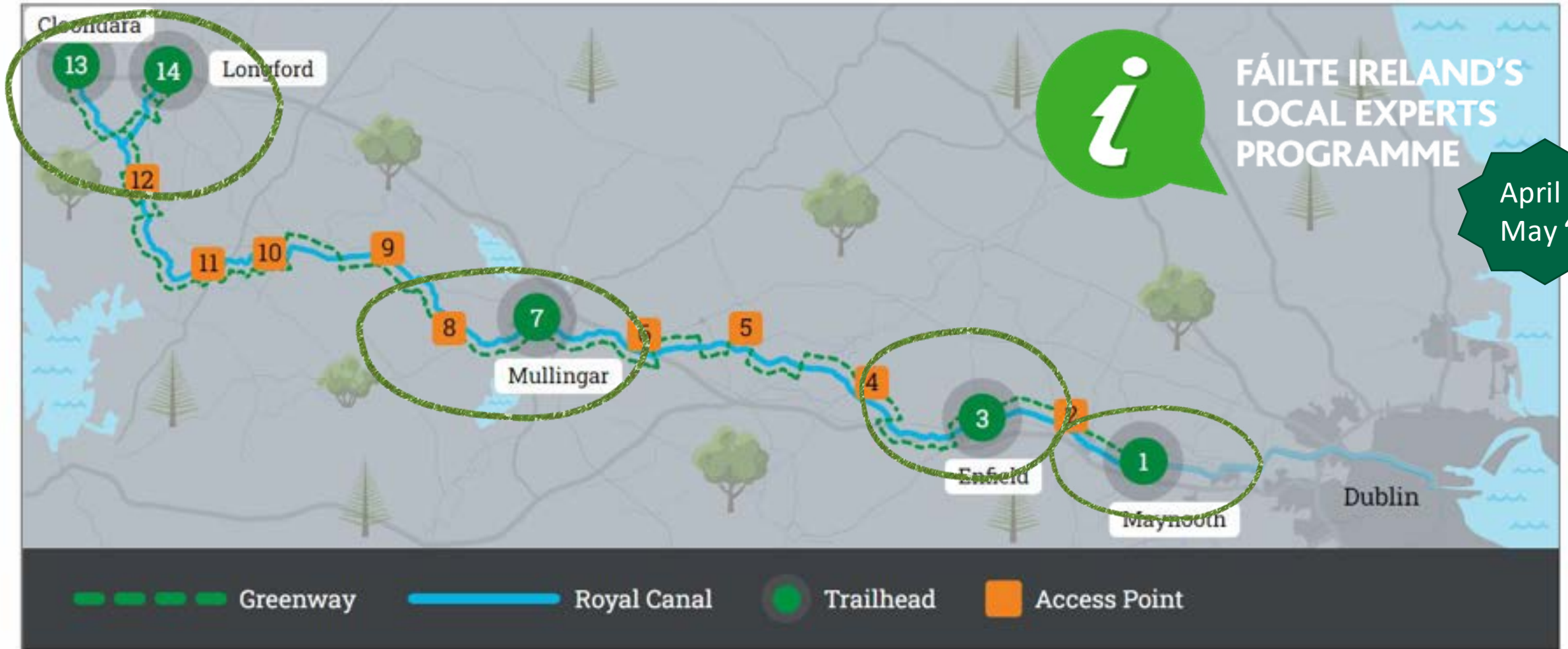
Location: Mullingar Park Hotel, Mullingar, Co. Westmeath



In partnership with Waterways Ireland and Local Authorities



# Royal Canal and Greenways Cluster Activation



# Táin Trail Route

- Review and re-present the Táin Trail as an attractor to the area
- A reimagined Táin Trail, pinpointing of brilliant visitor experiences that will disrupt typical visitor flows encouraging increased visitation and dwell time along the route.
- Development of focused industry clusters/hubs at key touch points





# Festivals, Outdoor Participative Events & Walking Festival Series



The Gaelforce Great Swim Trilogy  
River, Lake & Sea



Round 6 & 7 Slieve Blooms  
29th & 30th April 2023



Walking Festival Series

# Sustainable Development and Greening of the Cruise Hire Sector



Fáilte  
Ireland

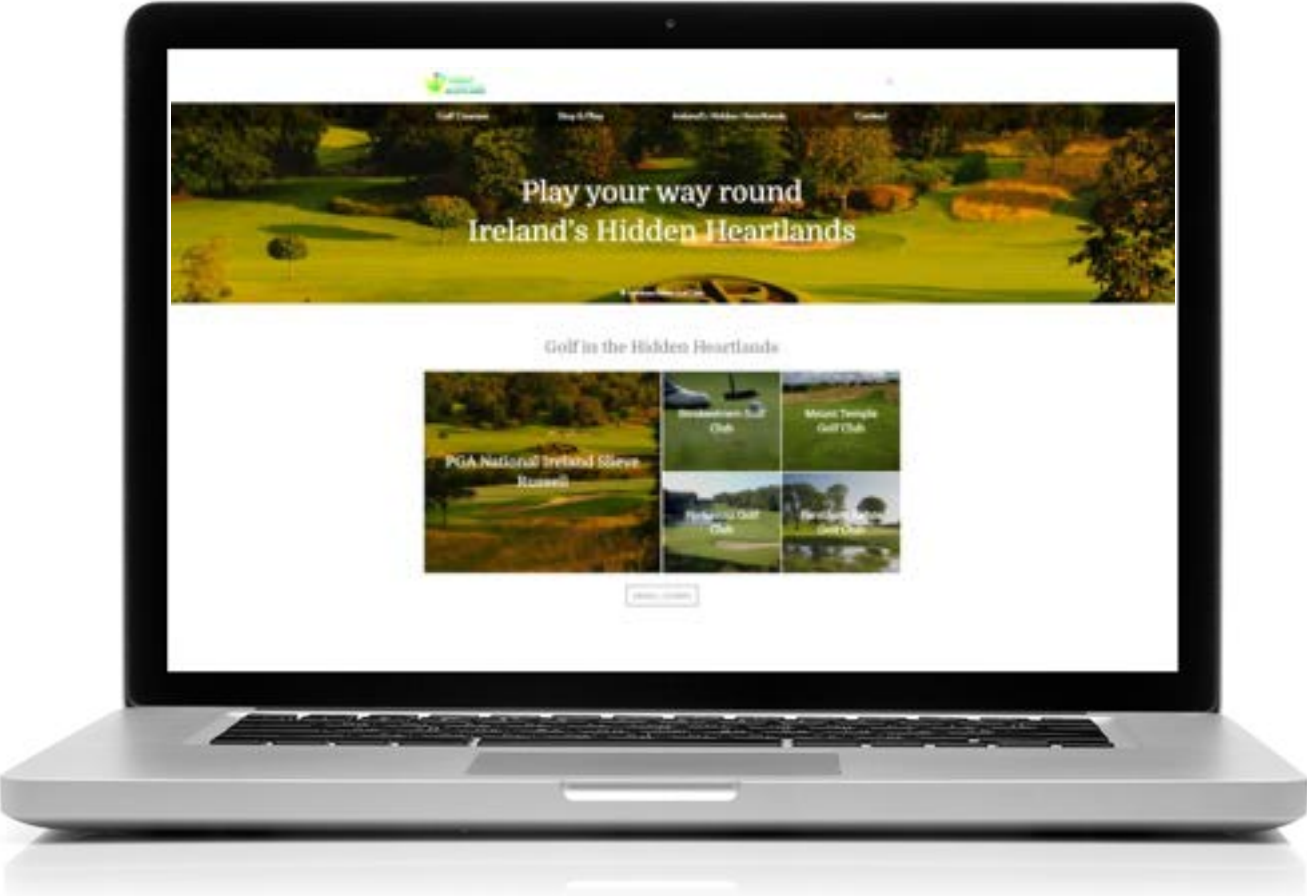


Ireland's Hidden  
HEARTLANDS

- Explore options for the renewal & expansion of the Fleet
- New Cruise Hire Hubs & Berthing
- Identify key issues, challenges & opportunities for sector growth
- How to increase consumer demand and identify the barriers for growth
- Learn from International Case Studies on rejuvenation and expansion of their fleet
- Greening of the Sector to meet Climate Action targets



# Hidden Heartlands Golf





# Golf



- IHH Golf represented at **Irish Open 2022**
- Development of the **IHH Golf Website**
  - Improve content for greater user experience
  - Online booking function is available for future
- Sponsored **International Kings Cup** in Glasson

# Raising awareness of the region





# Regenerative tourism and the Just Transition Fund 2023-2027

Regenerative tourism isn't built from scratch.

Instead, it asks us, as communities, tourism businesses and other stakeholders, to:

- Recognise and re-assess the assets we already have, in terms of nature, culture, people, and infrastructure;
- Re-imagine the ways we make use of these fragile assets so that we nurture rather than exploit them;
- Respect our natural and cultural resources, helping them to flourish and play an ongoing role in sustainable development;
- And make decisions based on a clear understanding of our own community's needs as well as visitor needs and tourism trends.





# Regenerative Tourism Scheme 2023-2027

---



## Strand 1

Trail development on old railways through rehabilitated wetlands

## Strand 2

Amenities and Support for SMEs

## Strand 3

Low-carbon alternative accommodation

## Strand 4

Smart solutions/digitisation programme for the tourism sector



Fiona Monaghan  
Head of Product  
Development



Fáilte  
Ireland

DRIVING  
SUSTAINABLE

*Recovery*



# EU Just Transition Fund for Ireland



Fáilte  
Ireland



Ireland's Hidden  
HEARTLANDS





# What is the EU Just Transition Fund

---



- The Fund's single specific objective is to support the regions and communities in Europe that are most negatively affected by the transition to climate neutrality, ensuring that no one is left behind.
- In essence, the EU JTF aims to address employment, economic, social and environmental impacts that come with the shift away from carbon-intense activities.
- In Ireland's case, the territory supported by the Fund will focus on the regions where there have been **direct impacts from the move away from peat** production and electricity generation from peat.
- Ireland will receive up to €84.5 million from the EU Just Transition Fund over the period to 2027. With the Government of Ireland's match funding using Exchequer resources, **up to €169 million** will be available.

# Just Transition Territory



County	MD covered
Laois	All
Westmeath	All
Offaly	All
Longford	All
Roscommon	All
Galway	G2 Ballinasloe
Tipperary	T2 Carrick on Suir T5 Thurles
Kildare	K1 Athy K4 Clane - Maynooth

# Tourism Journey.....



## Chronology of Events

---

- FI meeting with Department of Environment, Climate & Communications to bring attention to tourism as a Just Transition mechanism
- Submission to Draft Territorial Just Transition Plan (February 2022)
- In response to our submission invited by DECC to make a funding scheme proposal (March 2022)
- Iterative process from April to July developing out the proposed scheme **“A Regenerative Tourism and Place Making Scheme for Ireland’s Midlands”** to form part of Ireland’s EU Just Transition Plan
- Funding awarded Dec 2022



An Roinn Comhshaoil,  
Aeráide agus Cumarsáide  
Department of the Environment,  
Climate and Communications

### Draft Territorial Just Transition Plan

EU Just Transition Fund

2021



# EU Just Transition Fund for Ireland €169M

- Fáilte Ireland Regenerative Tourism & Placemaking Scheme for the Midlands - €68m
- NPWS Peatland Rehabilitation & Community Trails - €12M
- Department of Transport – E-Charging Infrastructure (ZEVI) & Mobility Initiatives (NTA) - €18M
- Department of Agriculture – COE's Farming in Wetlands & Job Creation - €35M
- Pobal Community Fund (LEDC's) - €29M



# European Just Transition Fund - 3 Priority Areas



## Generating Employment

***Generating employment*** for former peat/fossil fuel communities by investing in the *diversification of the local economy*



## Supporting Regeneration & Repurposing of Peatlands

Supporting the ***regeneration and repurposing of post-industrial peatlands*** and related land



## Providing Smart & Sustainable Mobility Options

Providing former peat communities with ***smart and sustainable mobility options*** to enable them to benefit directly from the green transition

# Regenerative Tourism Strands

---

## Strand 1

Trail development on old railways through rehabilitated wetlands.

## Strand 2

Amenities/Experiences & support for SME's

## Strand 3

Low-carbon alternative accommodation.

## Strand 4

Smart solutions/digitisation programme for the tourism sector.



# Tourism Priorities Alignment

## Priority 1

*Generating employment for former peat communities by investing in tourism in the diversification of the local economy:*

- Strand 2 – Amenity & Supporting SME's
- Strand 3 – Alternative Low-carbon Accommodation
- Strand 4 – Smart Solutions/Digital Transformation

## Priority 2

*Support the regeneration and repurposing of peatlands and related land*

- Strand 1 – Connected Midlands Trail Network



# Regenerative Tourism & Place Making Scheme for Ireland's Midlands



## Strand 1 Midlands Trail Network

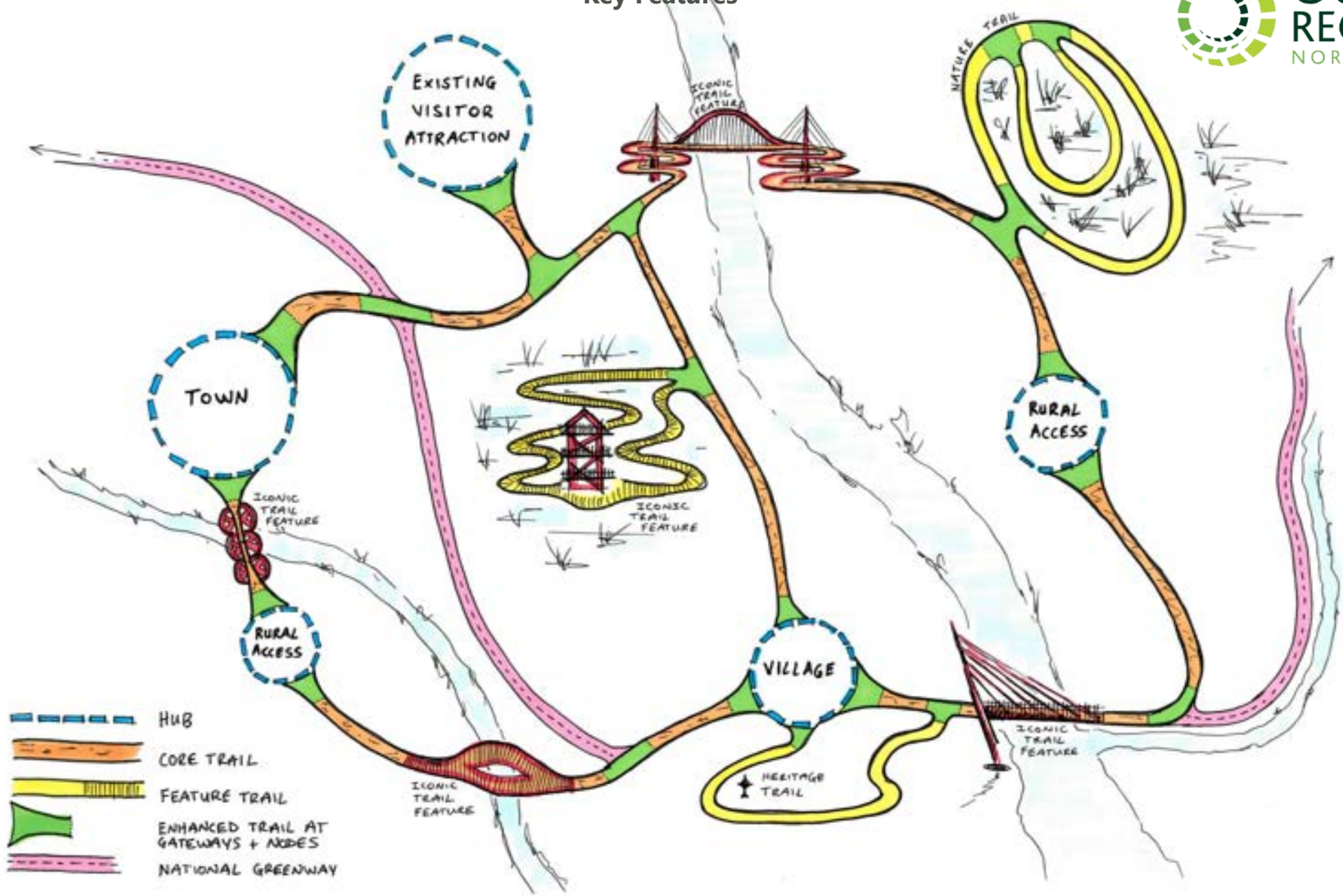
Deliver a strategic network of connected walking, cycling and water trails across the midlands.

Trails will inter-connect with the existing and emerging arterial Greenway network - including the repurposing of former narrow gauge rail track, culverts etc.

includes related infrastructure & enhancing the experience e.g. reimagined industrial bridges formally used to transport peat to factories across the JTF region to thematic experiences; place-making and art installations; signage and interpretation to create a sense of connectivity across the towns and villages, bogs and waterways of the Just Transition region.

**KPI – Km's of trails delivered/land rehabilitated**

# Midlands Trail Network Key Features





# Regenerative Tourism & Place Making Scheme for Ireland's Midlands



Strand 2  
Amenity development  
& Support SME Businesses in  
tourism sector

Support public, private or community-based tourism enterprises to develop new and expand existing regenerative and sustainable tourism infrastructure and experiences to help enhance and sustain local economies.

Support small to medium enterprises to provide and/or expand on and off the water activities, e.g. bike hire, water sports etc.

These enterprises must operate to a high standard in terms of sustainable tourism (e.g., the Global Sustainable Tourism Council standard) and be accessible to all.

Contribute to the development of attractive destinations that are connected to the trails network.

**KPI – Employment generated/Enterprises supported**

# Regenerative Tourism & Place Making Scheme for Ireland's Midlands



## Strand 3 Alternative low carbon Accommodation

Small developments at key locations along trails. Carbon Neutral / Low Carbon developments, aligned to trail and hubs e.g. Glamping, Campervans, Log Cabins etc.

Demonstration effect and provide confidence to the private sector for future accommodation investments in Carbon Neutral / Low

**KPI – Employment generated**

## Strand 4 Smart solution development

Provide a range of skills capability development supports for smart/digital transformation; support entrepreneurship, enhancing & digitalisation, (e-Business, networked business processes, digital innovation hubs, ICT start-ups, AI/VR, Accessibility etc.)

Through the deliver of Smart technologies and digital solutions this investment will result in widespread benefits for the consumer, business and the

**KPI – Employment generated/Enterprises supported**

# Product Investment Pipeline





# The National Famine Museum, Strokestown Park



Co. Roscommon

Fáilte Ireland Funding: €3,925,364

Total Project Costs: €5,164,972

Opened: 2022

# Norman Heritage Park - Granard



**Co. Longford**

**Fáilte Ireland Funding: €638,000**

**Total Project Costs: €4,400,000**

**Expected Opening Date: 2024**



# Shannon Pot Discovery Centre & Cavan Burren Park



Co. Cavan

Fáilte Ireland Funding: €4,832,585

Total Project Costs: €6,600,000

Expected Opening Date: 2025



# Water Sports Facilities – 3 Locations



Lough Derg - Co Clare & Co Tipperary  
Shannon Blueway – Co Leitrim  
Fáilte Ireland Funding: € 2,550,000  
Expected Opening Date: 2023 & 2024

# Shannon Jetties & Moorings



Redbridge



Athlone



Rooskey

**Rooskey, Redbridge & Athlone**  
**Fáilte Ireland Funding: € 781,550.00**  
**Total Project Costs: €976,937**  
**Opening: Spring 2023**

# Connaught Harbour Redevelopment



**Co. Galway**  
**Fáilte Ireland Funding: € 2,080,250**  
**Total Project Costs: €2,773,666**  
**Expected Opening Date: Summer 2023**





# Shannon Masterplan In Progress Projects



**Shannon Discovery Points Masterplan**



**Clondara / Tarmonbarry Masterplan**

# Ireland's Mountain Bike Experience Slieve Blooms & Ballyhoura

---



**Slieve Blooms & Ballyhoura**  
**Joint RRDF Project with Coillte & Local Authorities**  
**Total Project Costs: €13.68 million**  
**Expected Opening Date: 2024 - 2025**





# Visitor Services & Trail Head



An Roinn Forbartha  
Tuaithe agus Pobail  
Department of Rural and  
Community Development





# Greenway Developments



The Royal Canal Greenway



Old Rail Trail



Old Rail Trail



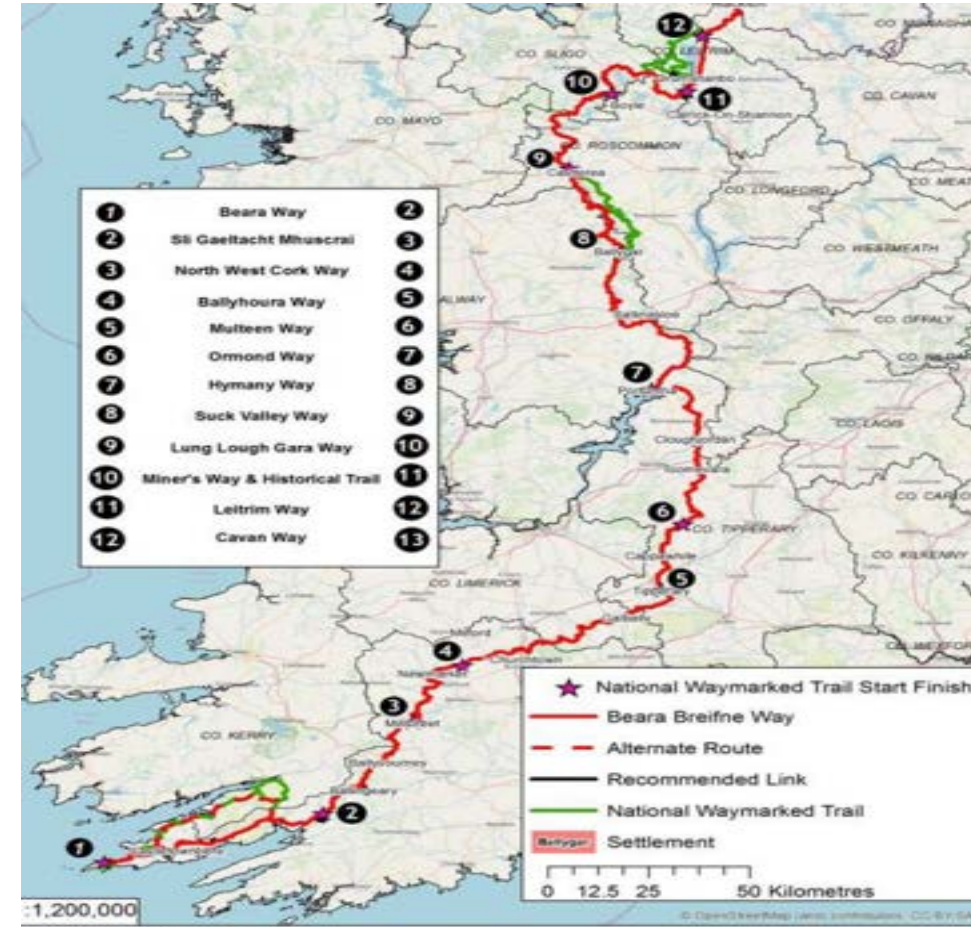
# Blueway Developments



2022 – Lough Derg Blueway  
2023 – Shannon Blueway



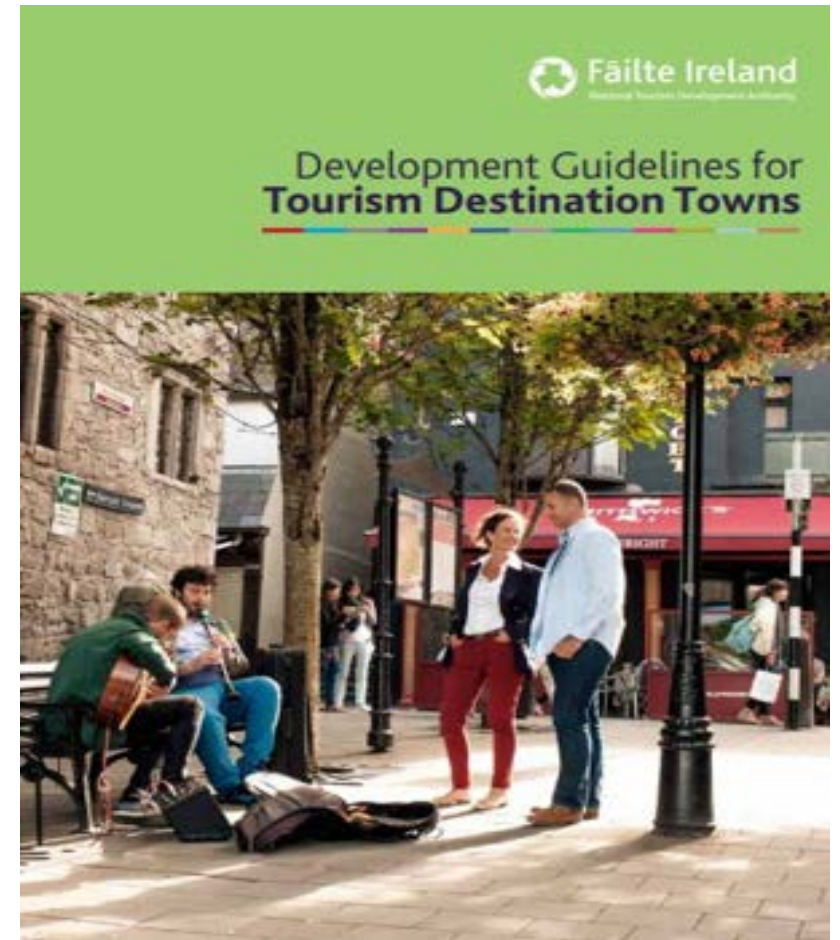
# Beara Breifne Way



Beara Breifne Walking Route



# Destination Towns – 6 Locations





Fiona Dunne,  
Manager, Ireland's  
Hidden Heartlands



Fáilte  
Ireland

DRIVING  
SUSTAINABLE

*Recovery*





# Industry Voices from Ireland's Hidden Heartlands

---



## Collaboration to Drive Sustainable Recovery



**Margaret  
O'Sullivan**  
Deebert  
House Hotel  
& Ballyhoura  
Tourism



**Fiona Egan**  
Cloughan  
Farm &  
Cookery  
School



**John  
O'Sullivan**  
Hodson  
Bay Group



**Úna Doris**  
Tourism  
Officer  
County  
Westmeath





Aileen Deasy  
Manager, Enterprise  
Supports



Fáilte  
Ireland

DRIVING  
SUSTAINABLE

*Recovery*



# 2022 Supports

---



**153** Businesses &  
**326** Employees from  
*Ireland's Hidden Heartlands*  
businesses attended Fáilte  
Ireland training workshops  
and webinars in 2022

## Most popular Programme Areas:

- Energy Management  
Climate Action Supports
- Saleable Experience  
Development
- Sales & Marketing

# Challenges

---





# Competitiveness

---



**Reducing  
Costs**

**Increasing  
Revenues**

**Exceptional  
Customer  
Value  
Experience**

# 2023 Strategic Priorities

## Reducing Costs & driving business efficiencies



- To Reduce Costs
- To drive Efficiencies
- To deliver VFM and great customer experiences

## Digitalisation



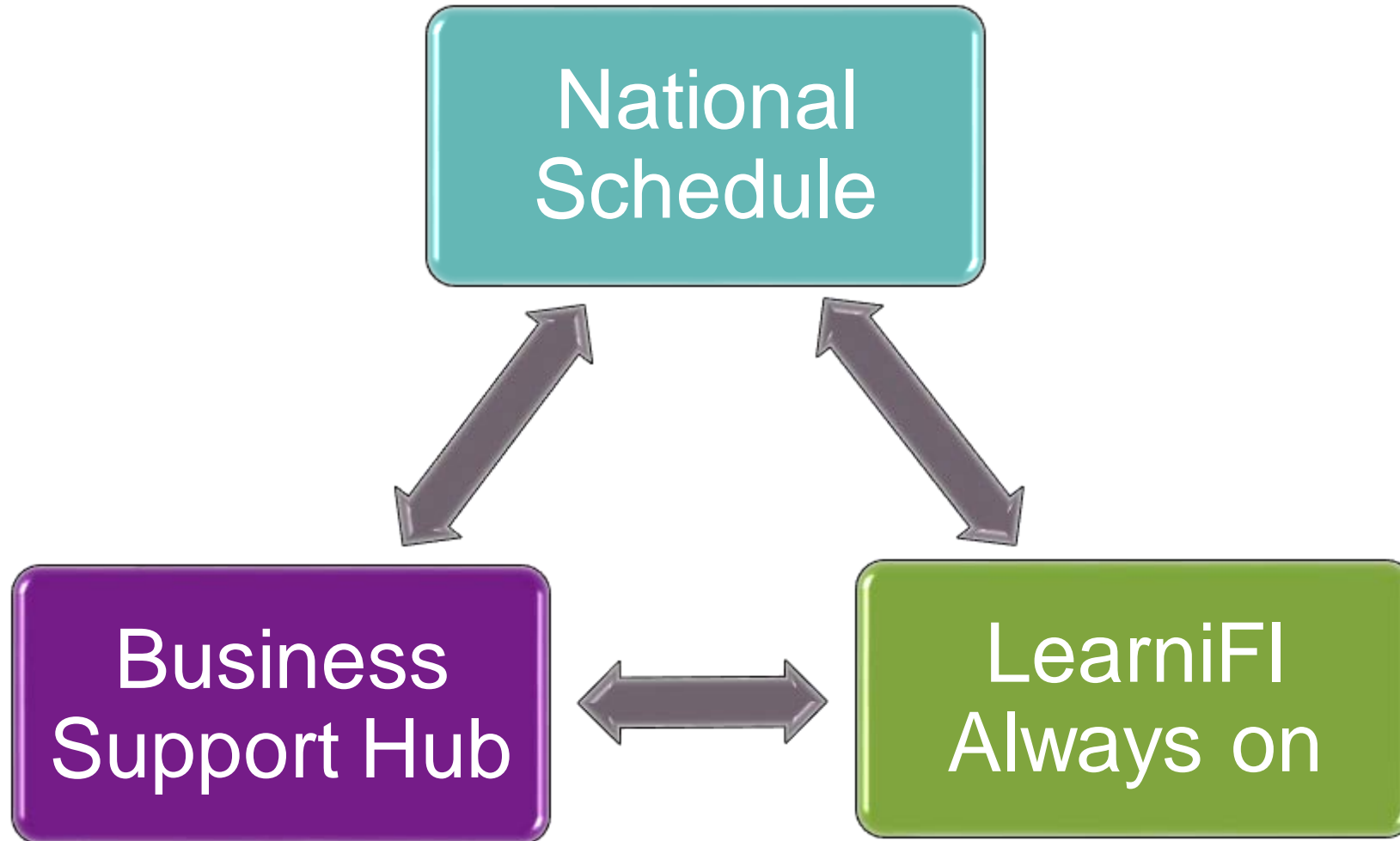
- Increase customer reach and engagement
- Drive sales & revenue online using web, social & connected distribution
- Data analytics & tech adaptations for big impact with small investment

## Climate Action



- Measuring your carbon Footprint
- Practical supports to develop and implement your action plan
- Supported by case studies and expert guides

# Engaging with Supports





# National Schedule & Support Hub

---



Sales and  
Marketing

Digital Marketing  
Skills

HR Supports

Revenue  
Generation

Accessibility in  
Tourism

Energy, Water and  
Food Waste  
Reduction

Finance



**150+ Modules available** Accessible anytime, anywhere and on any device



# Our ask of you today...

---

1. Help your Business grow – Speak to your local contact for further information on the programmes available to support your business in 2023
2. Focus in on developing your business commercially through Fáilte Ireland's National Calendar of supports and the Business Support Hub
3. Encourage your staff to upskill and engage with the New **learniFI** – always on learning **to support your teams**







Kathrin Chambers,  
Digital Marketing  
Manager



Fáilte  
Ireland

DRIVING  
SUSTAINABLE  
*Recovery*



# Communications Journey



## CATEGORY BUILDING

**THINK ABOUT GOING**  
Making Ireland salient in the minds of the domestic audience  
**Role: Inspiration**

## REGIONAL EXPERIENCE BRANDS



**WHY SHOULD I GO  
(REASONS TO BELIEVE)**  
Keep Discovering starts the story.  
It establishes Ireland and its regions in the minds of consumers.  
**Role: Inspiration & Consideration**

## DESTINATIONS, OCCASIONS, FESTIVALS & EVENTS

**WHERE SHOULD I GO & WHY GO NOW**  
The creative builds the Keep Discovering story highlighting places to go and significant reasons to travel now. County creative completes the story. It moves consumers to a specific location providing the final pull to encourage that short break.  
**Role: Conversion**



# Keep Discovering Campaign



AV-VOD & BROADCAST  
INTEGRATION



WEATHER  
SPONSORSHIP



AUDIO



PRINT



PUBLISHER  
PARTNERSHIPS

HIGH REACH, HIGH FREQUENCY MULTI-CHANNEL CAMPAIGN



SOCIAL



MEDIA RELATIONS



INFLUENCERS



DOMESTIC  
SALES

SUPPORTED BY BUSINESS & MARKETING TOOLKIT



# Inspiring the nation through TV

National  
TV  
across  
ROI & NI

Reaching  
55% of  
adults  
weekly



RTÉ

Virgin  
media

TG4

4

sky

U<sup>tw</sup>

# Building salience through Ireland's largest broadcast sponsorship



**120**  
Stings per week

**1.6 Million**  
Average  
Weekly Reach

**8.3**  
Average Weekly  
Frequency



# Driving national reach via audio & press



National  
radio  
targeting  
ROI & NI



Online  
audio for  
extended  
reach





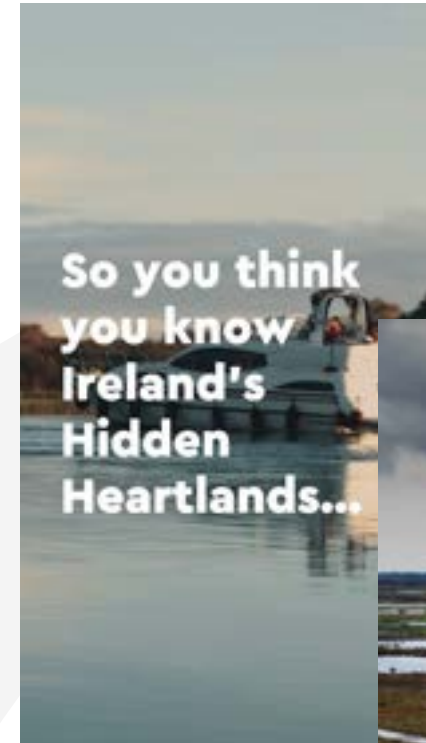
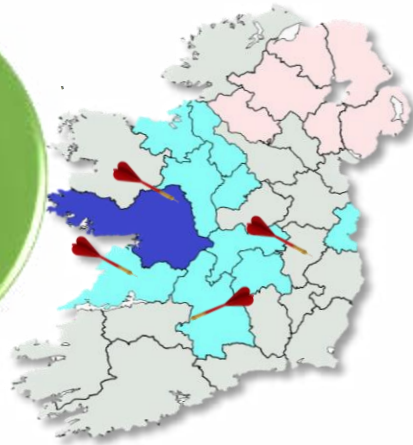
# Driving relevancy through digital & social



Geo-targeted ads

Within 2-hour radius

YouTube



Always-on social



# Showcasing experiences via TV Partnerships...



**159K**  
Reach  
per segment



**130K**  
Reach  
per segment

**1.6M**  
Total Partnership  
Reach



# ...and Digital Partnerships

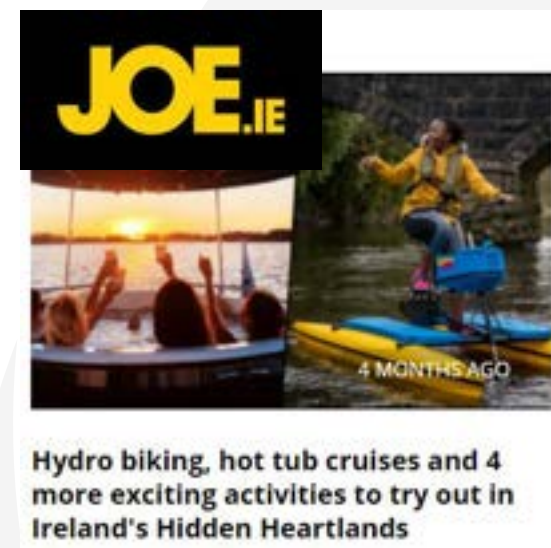


Lovin.ie

22 Weeks  
58 items of  
content



5.8M  
Total social  
Reach





# Building positive word-of-mouth through influencers & PR



**Greg O'Shea**  
Reach  
1.1M+



**Influencer Programme**  
Reach  
13.5M+



**Eric Roberts**  
Reach  
270K+



**Sunday Independent**  
Reach 800K+



**Earned Media**  
Reach  
16M+



**RTE.ie**  
Reach  
2M+



**Irish Daily Mail**  
Reach  
38K+

# Showcasing the best things to See and Do via website & email



Emails Database: 60K

Open Rate: 30%

Published Twice a month

187,151  
Sessions

30,032  
Referrals





# Building communities on Social Media



**1.5m**  
Community Size



**5.7%**  
Average Engagement Rate



# Top Performing Posts



Roscommon  
Views - 9k



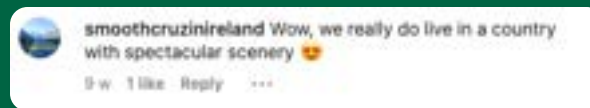
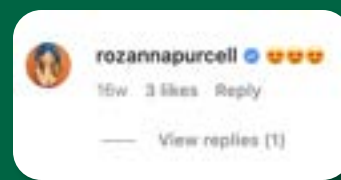
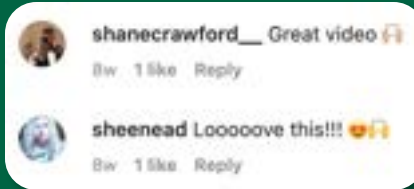
Slieve Bloom  
Views - 11k



Athlone  
Views - 6k



Killaloe  
Views - 5k



**1M**

Total Impressions



DRIVING  
SUSTAINABLE  
*Recovery*

# How you can get involved



# Keep Discovering Industry Toolkit

---



**Free**  
Marketing  
Content

A teal circular button with a white icon of a laptop displaying a bar chart. Below the icon, the text "Free Marketing Content" is written in white.

Save  
**Time**

A green circular button with a white icon of a clock. Below the icon, the text "Save Time" is written in white.

UPSILL AND  
GET PRACTICAL  
MARKETING  
ADVICE

A green circular button with a white icon of a person standing next to a whiteboard. Below the icon, the text "UPSILL AND GET PRACTICAL MARKETING ADVICE" is written in white.

Save  
**Money**

A teal circular button with a white icon of a piggy bank. Below the icon, the text "Save Money" is written in white.



An aerial photograph of a river winding through a rural landscape. The river is dark blue and flows from the top center towards the bottom. The surrounding land is a mix of vibrant green fields and dense, darker green trees. In the bottom left corner, a small boat is visible on the river. The overall scene is bright and clear, suggesting a sunny day.

**50,000 images and videos Free to use on  
Ireland's Content Pool**



# Key Takeaway

---



Be Part of  
*Keep  
Discovering*

[www.failteireland.ie](http://www.failteireland.ie)

Ireland's **CONTENT** POOL



Martin Donnelly,  
Manager, Commercial  
Development



Fáilte  
Ireland

DRIVING  
SUSTAINABLE

*Recovery*



# Commercial Development



## Leisure Tourism

- Destination Development
- B2B Routes to market
- Itinerary Development
- Buyer programming
- Golf & Luxury



## Trade Team

- In Ireland Platforms - Meitheal
- Buyer FAM trips
- Recruitment for overseas
- leisure events
- Management of trade portal



## Business Tourism

- Generate Business Event Leads
- Lead conversion & distribution
- Pipeline management
- Supporting industry conversions
- Regional Convention Bureaux



# Impact in 2022

---



## Leisure Tourism

- **€36.5m** Incremental Revenue, In Year
- Bed nights delivered across 26 Counties
- **6,000** Overseas Golf Travel Trade Campaign With Regional Messaging



## Trade Team

- **11** In Ireland Platforms providing **12,500+** contracting opportunities
- **900+** Industry recruited for In Ireland platforms
- Recruited **670+** Industry for **80** Overseas Platforms

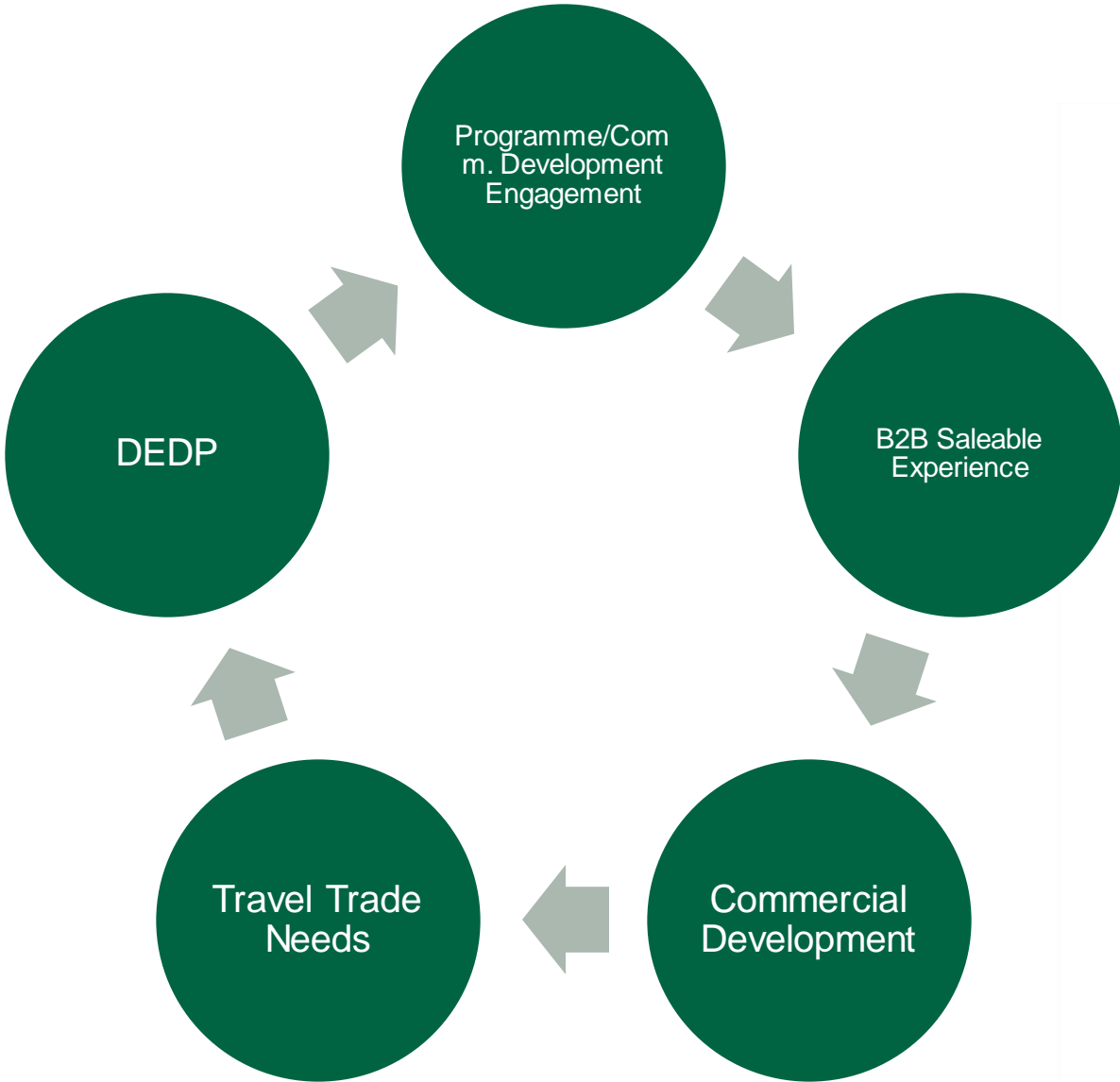


## Business Tourism

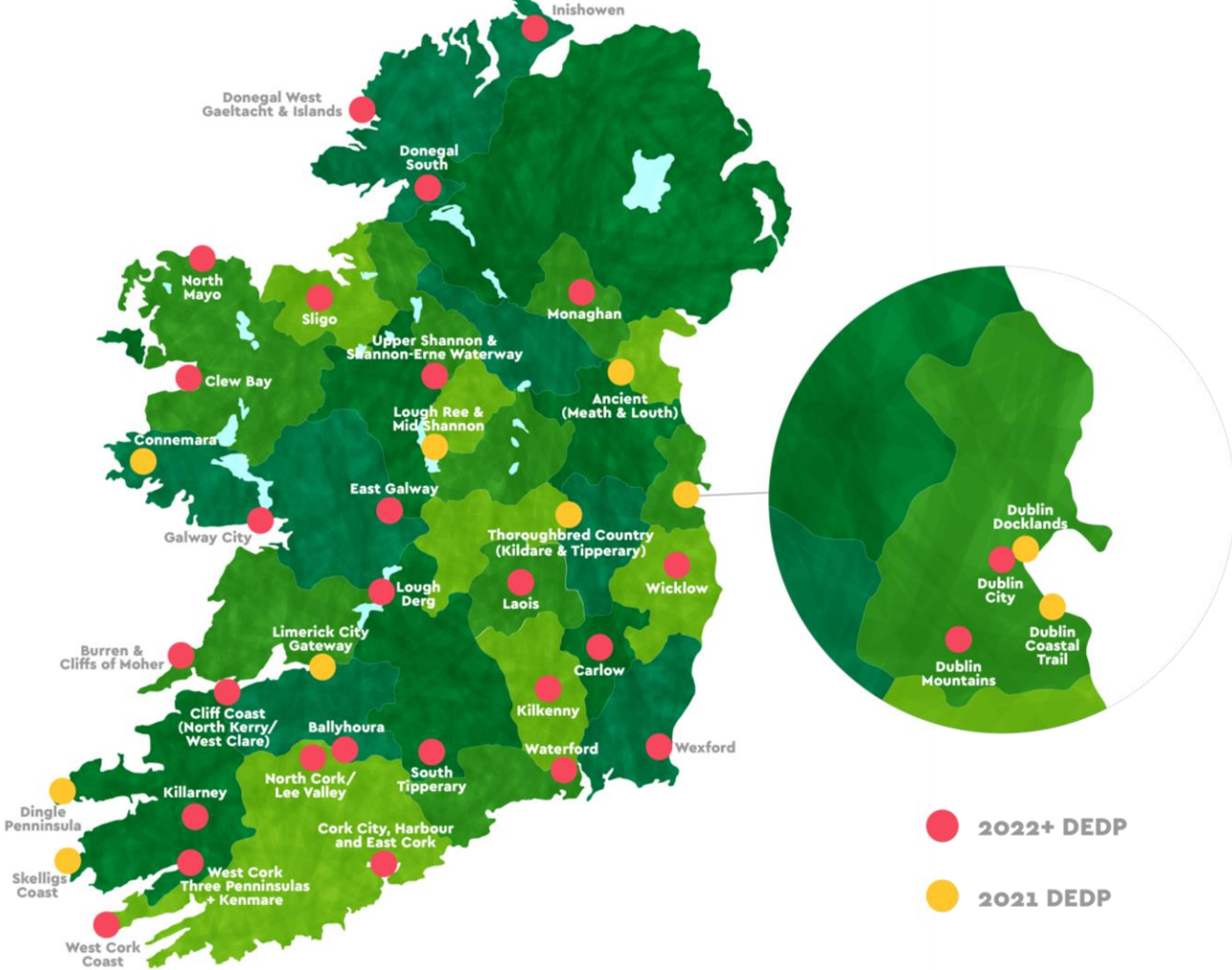
- **€202m** of Events Took Place
- **€271m** of Leads Generated
- **€183m** of Leads Converted
- **€660m** of Leads Added to Pipeline



# B2B Saleable Experiences



## 37 Local DEDPs





# Golf



IGTOA Fam Trip



DP World Tour Events



Caddie Programme



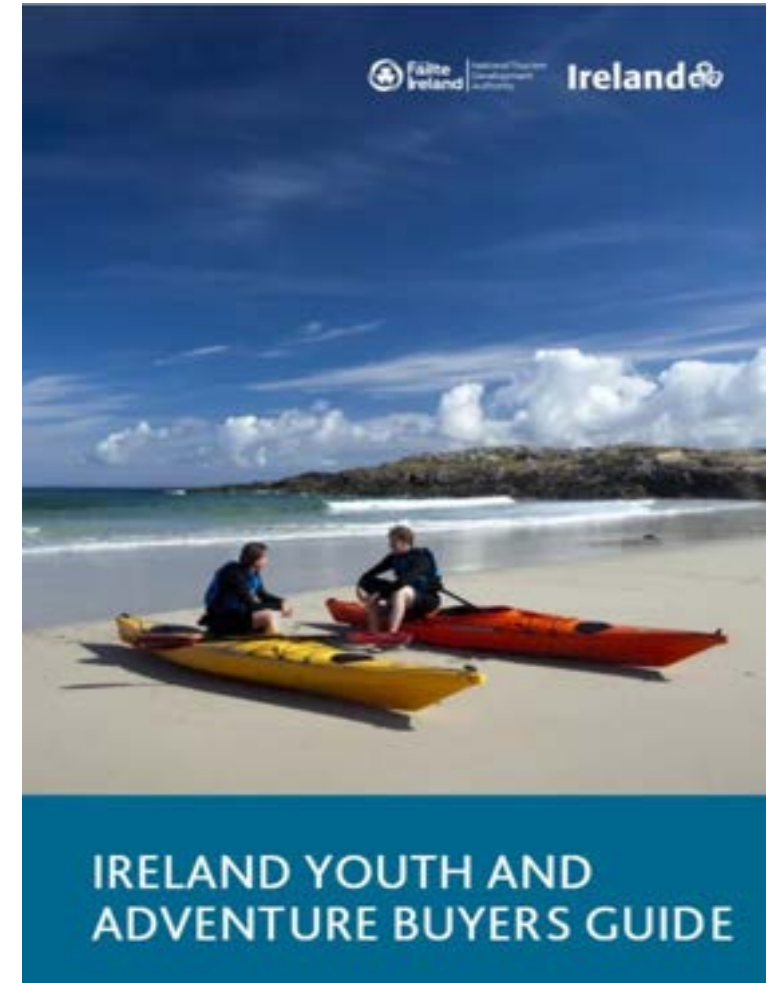
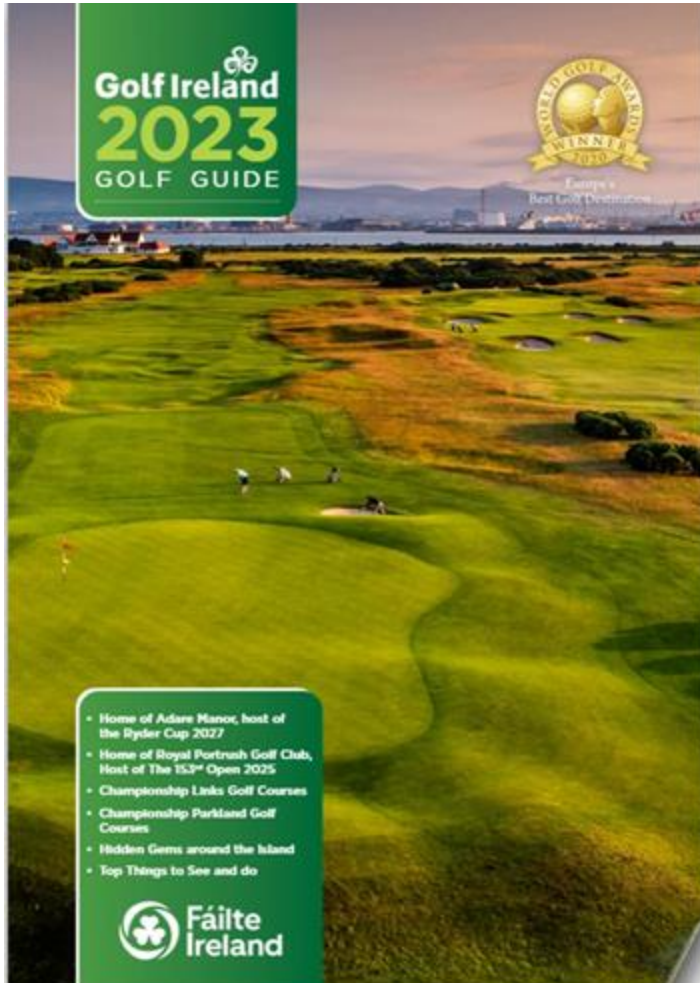
Golf Tourism Development Strategy



**300+**  
Industry places will be available  
to participate in these platforms  
across 2023

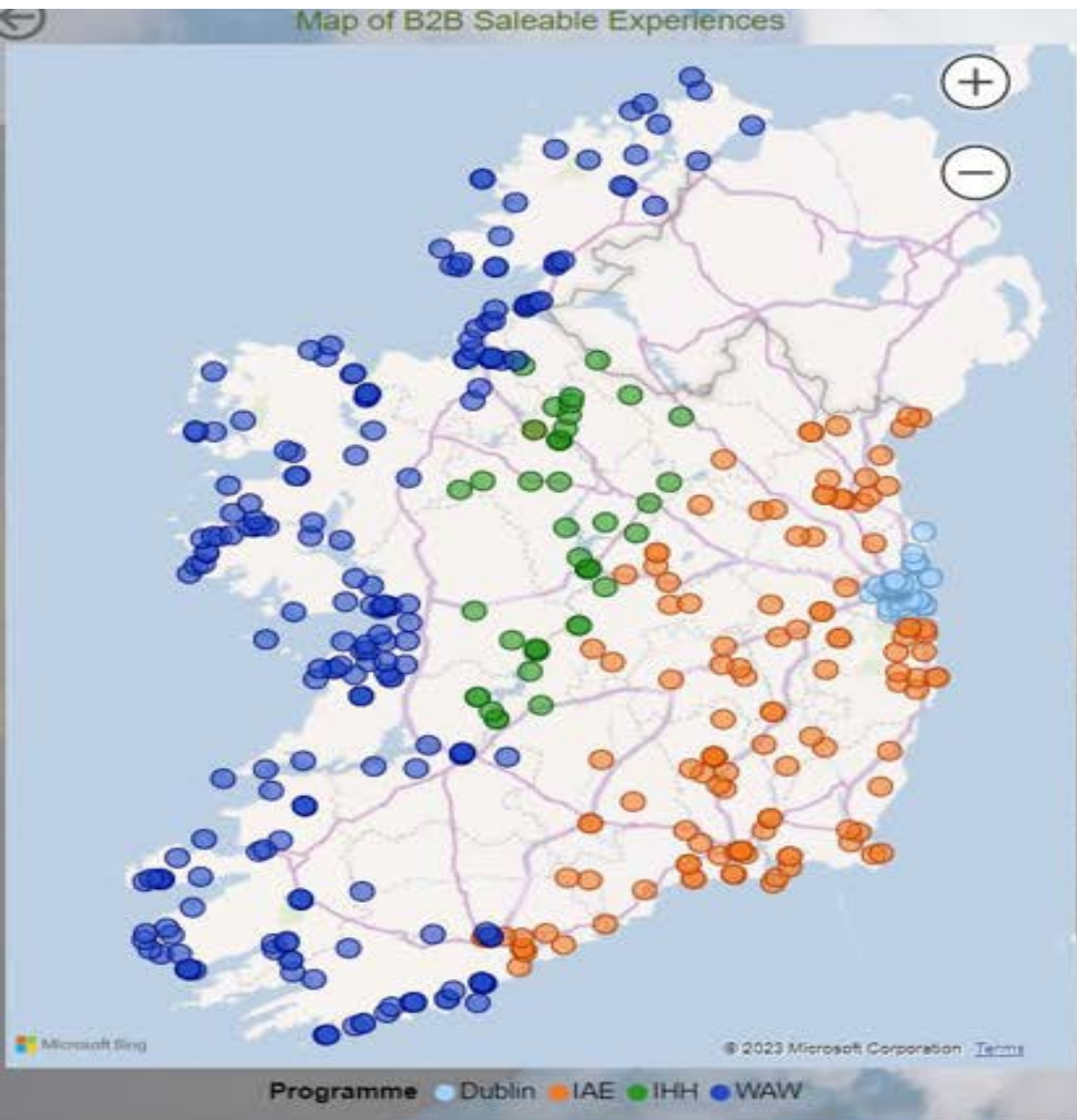


# Buyer Guides and Presentations





# Buyer Portal



Saleable Experiences by Signature Programme

WAW	IAE	Dublin
289	269	66
		IHH
		51

689  
Number of Saleable Experiences

488  
Number of Companies

Experience Category

Adventure Centre	Castles & Houses	Cruises, Ferries & Boat Hires	Food Experience	Irish Historical & Cultural Experience	National Park	Seafood & Seaweed Experience	Watersports
Arts & Crafts	Cookery School	Cycling Experience	Gardens	Irish Historical & Cultural Festival	On Land Sporting Activity	Signature Point	Wellness
Brewery Experience	Craft Experience	Equestrian Experience	Gin Experiences	Lighthouses	Religious Experience	Theatre & The Arts	Whiskey Experience
Bus Tours	Cruises, Ferries & Boat Hire	Farm Experience	Greenway	Museums, Libraries & Galleries	Sea Angling, Fishing & Boat Charters	Walking Trails & Walking Tours	Wildlife Experience

Experience by County

All



# Platforms and FAM's





# Golf, Luxury & Business Tourism



DRIVING  
SUSTAINABLE  
*Recovery*



# Golf



IGTOA Fam Trip



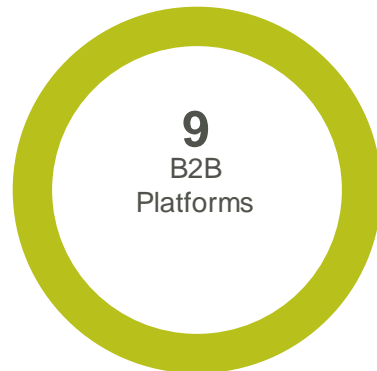
DP World Tour Events



Caddie Programme



Golf Tourism Development Strategy



**300+**  
Industry places will be available  
to participate in these platforms  
across 2023





# Luxury



Luxury Strategy



Master Connections



Luxury FAM



Engage

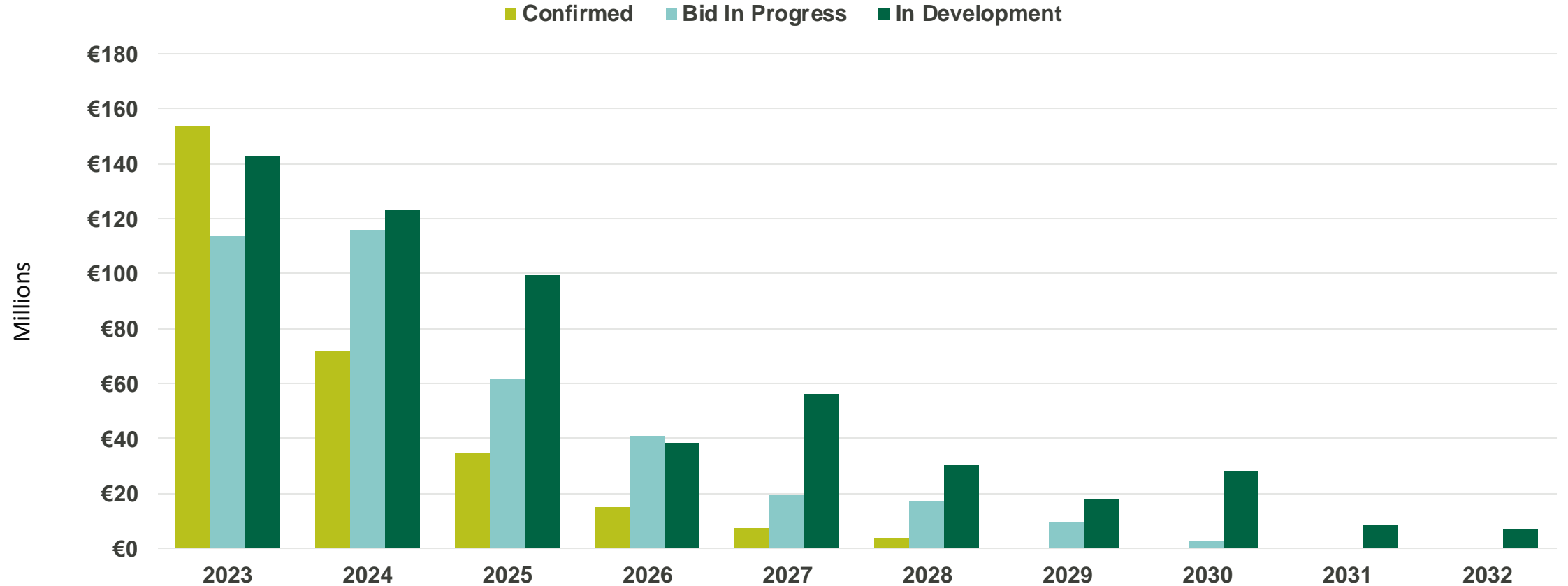
**1**  
**Luxury strategy Master Connections**

**4**  
**Fams**  
**30+ buyers**

**20**  
**Overseas**  
**sales platforms**

**1**  
**Luxury Destination**  
**Showcase**  
**40 buyers**

# Business Events Pipeline 2023 - 2032



**€1.22bn**  
Events Value

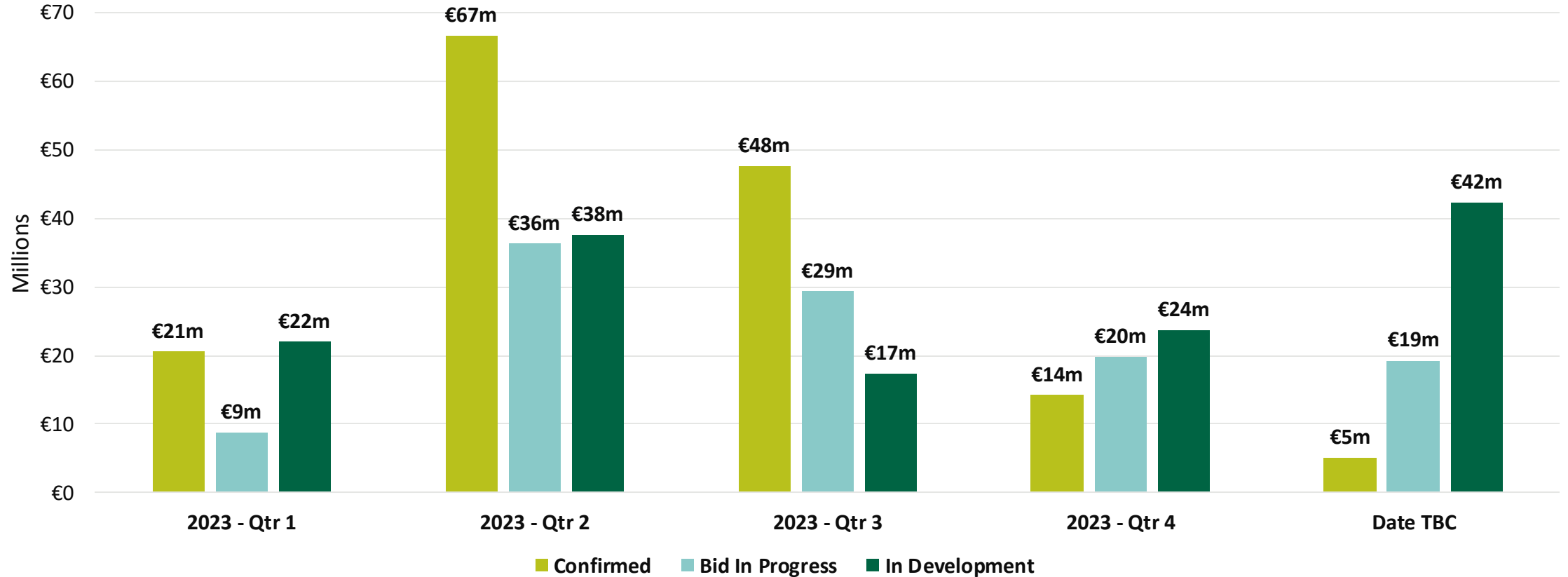
**€287m**  
Confirmed (24%)

**€381m**  
Bid Pending (31%)

**€552m**  
Bus. Dev (45%)

**718k**  
Int. Delegates

# Business Events: Event Year 2023



**€410m**  
Value Pipeline

**€154m**  
Confirmed (38%)

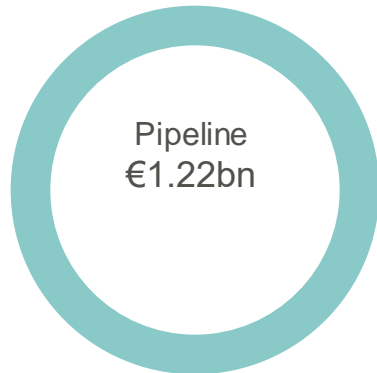
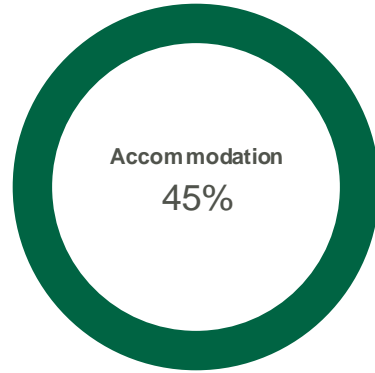
**€113m**  
Bid Pending (28%)

**€143m**  
Bus. Dev (35%)



# Business Events Value

---



# Commercial Development 2023



## Leisure Tourism

- Providing distribution opportunities for saleable experiences from **37 DEDPs**
- Routes to market via 96 **IBIA**
- Presenting B2B experiences at **48** overseas platforms
- **New Golf & Luxury** Strategies



## Trade Team

- **8** In Ireland Platforms providing **15,500** contracting opportunities
- **900+** Industry recruited for In Ireland platforms
- **400+** to be recruited for Industry for **50** Overseas Platforms



## Business Tourism

- **€274m** Leads Generated
- **€192m** Leads Converted
- **€700m** Added to Pipeline
- **€211m** of Events Taking Place
- New **Business Tourism** Strategy

# Digital that Delivers

Scale, investment & economic impact:



Visitor Experiences



Total Investment



Total Impact



Job Creation



# Positioning Ireland for Success



1

Consumers



2

Industry



3

Destinations



4

Ireland





# Thank you



Ireland's Hidden  
HEARTLANDS



# Q&A





# Leisure Sales & Distribution content

---



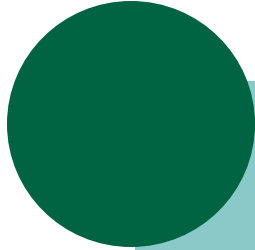
- Changing environment / context
- Leisure routes to market and opportunities for businesses in region (ITOA workshops in 2022 and plans for 2023)
- Meitheal
- Digital that Delivers



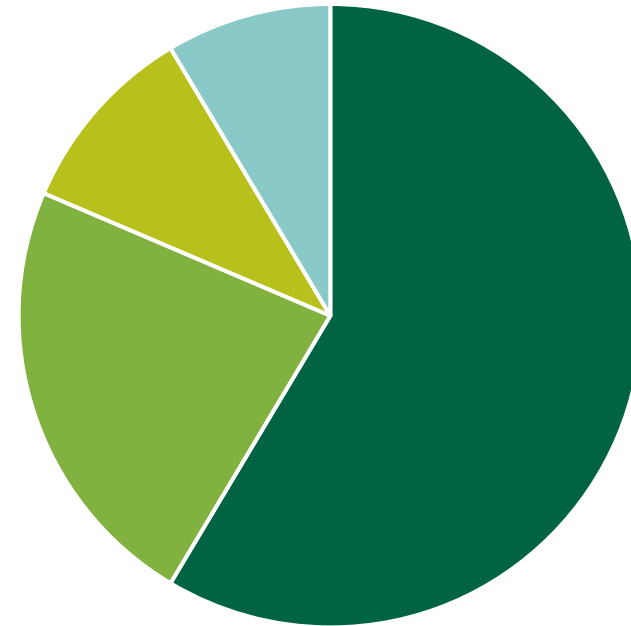












■ 1st Qtr ■ 2nd Qtr ■ 3rd Qtr ■ 4th Qtr

---

Notes and references can go here when necessary. This copy is Arial Regular 14pt. Magna aliqua. Ut enim ad minim veniam, quis nostrud lorem ipsum.