

DRIVING
SUSTAINABLE

Recovery

Regional Industry Briefing

Hotel Kilkenny

22nd February 2023



Agenda



1

2022 in Review and 2023 Outlook

2

Developing the Region

- RTDS / DEDPs
- Enterprise Supports
- New Product Development

3

Promoting the Region

4

Providing Routes to Market



• Paul Kelly
CEO, Fáilte Ireland



Fáilte
Ireland

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Topics



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

Section 1

2022 Review

- Overseas
- Domestic

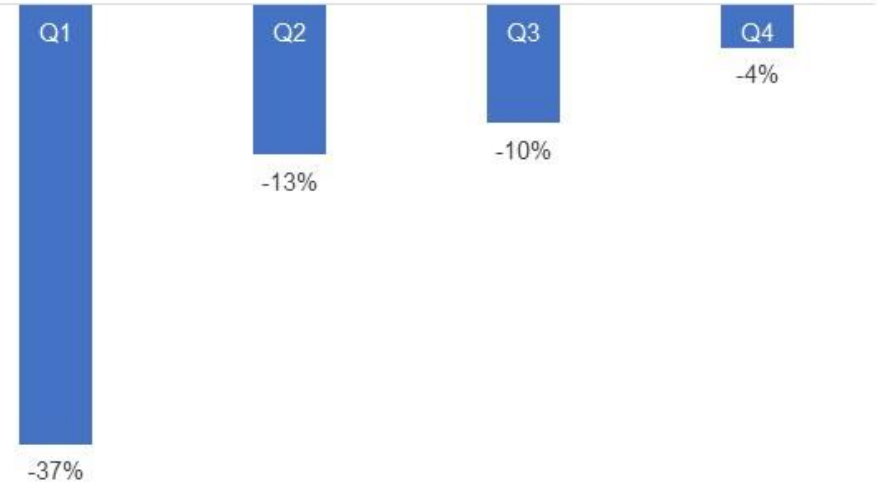


Overseas Market – Fast Recovery



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

% Change in Passenger Arrival by Quarter 2022 v '19



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

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

Section 2

2023 Outlook

- Demand side opportunities
- Supply side challenges
- Sustainability targets



Demand Side Opportunities



Opportunities in Overseas Market: Air Access Forecast 2023

Changes in Seat Capacity	Summer 2023 vs. 2019
GB	+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

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Supply Side Challenges



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



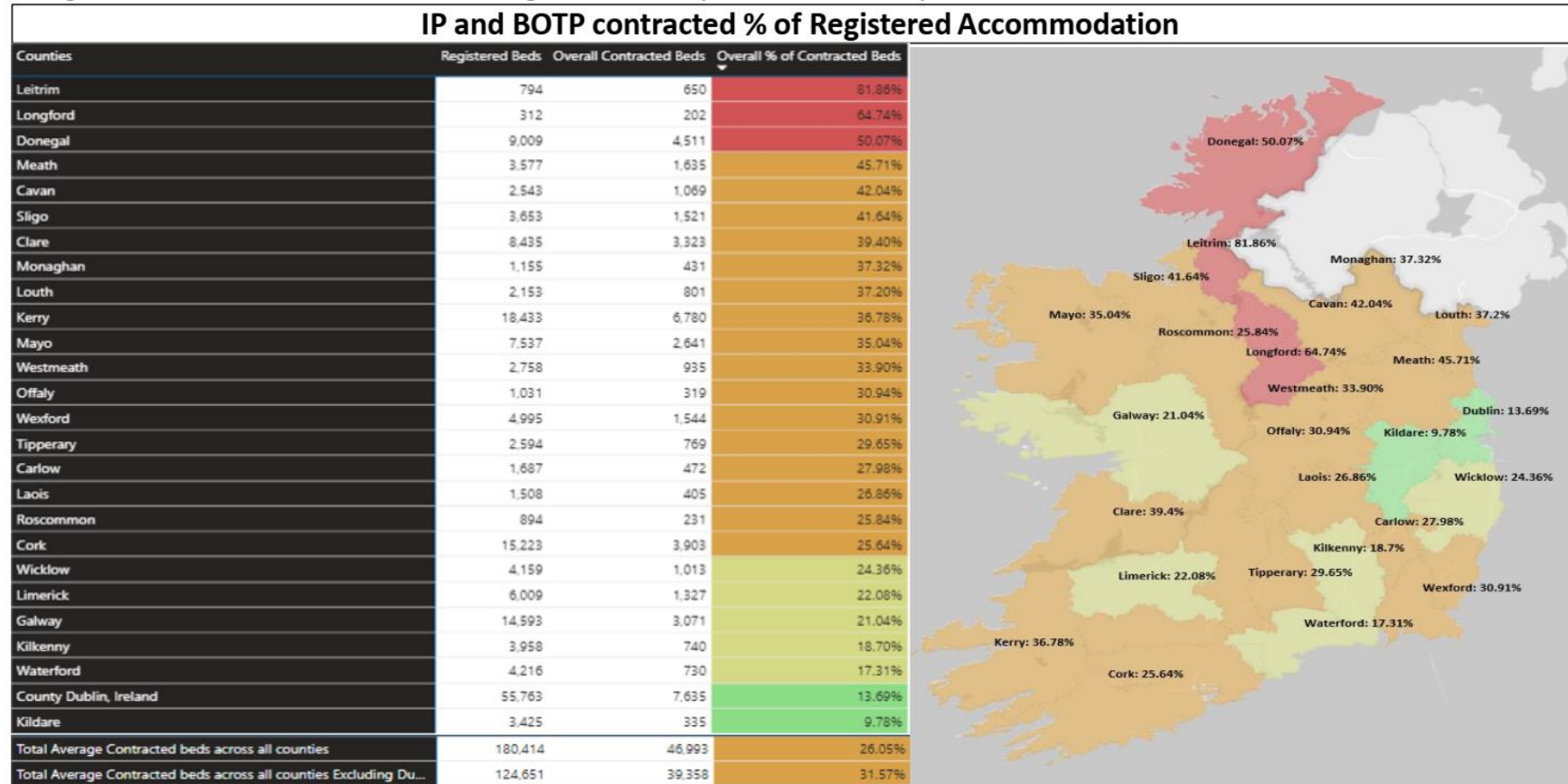
Combined IP and BOTP contracted beds in all Fáilte Ireland registered accommodation

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)



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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

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Section 3

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

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VISITOR

Destination Attitude Survey



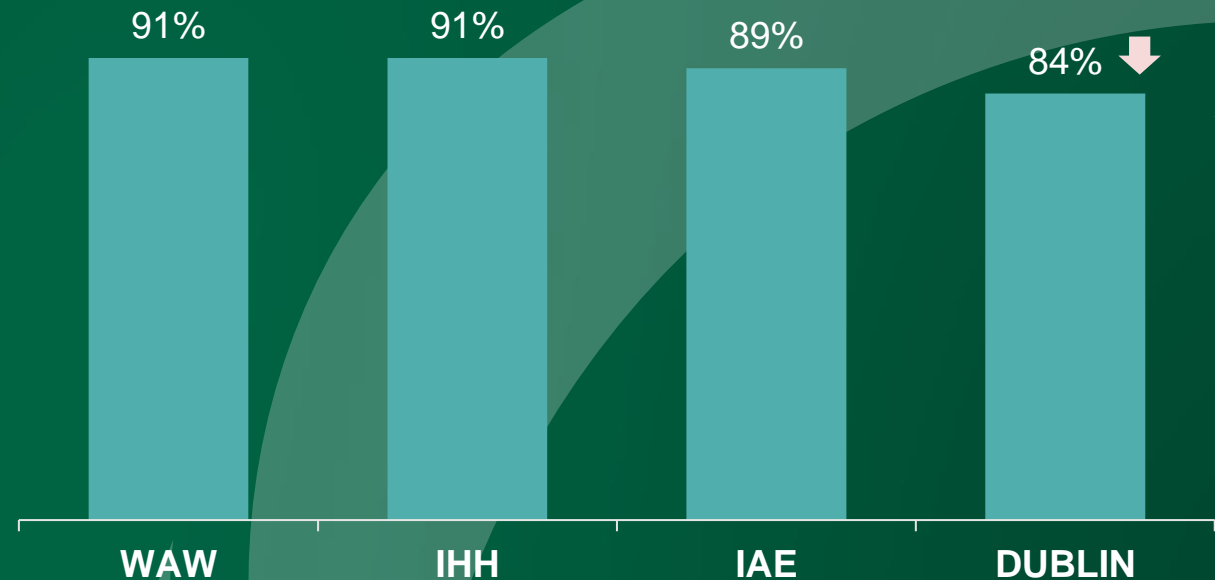
Visitor Destination Attitudes Survey

- 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%
(NAT. ave.)



Base: 8283

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



- IAE is a consistently strong performer with overall satisfaction and VFM in line with the strong national performance.
- Some DEDPs could benefit from improvements to functional elements of the visitor experience, but the scale of actions are more incremental as opposed to mitigating poor perceptions.
- Significant day tripping behaviour into the DEDPs, from both domestic and overseas visitors, suggests accommodation hubs outside of areas and a concentration in specific locations.

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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

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Occupancy & Rates



Fáilte Ireland Hotel Performance



Year to Date December 2022

	Occupancy			Ave 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%
Kilkenny	68	76	-8ppts	165	114	44%	112	87	30%

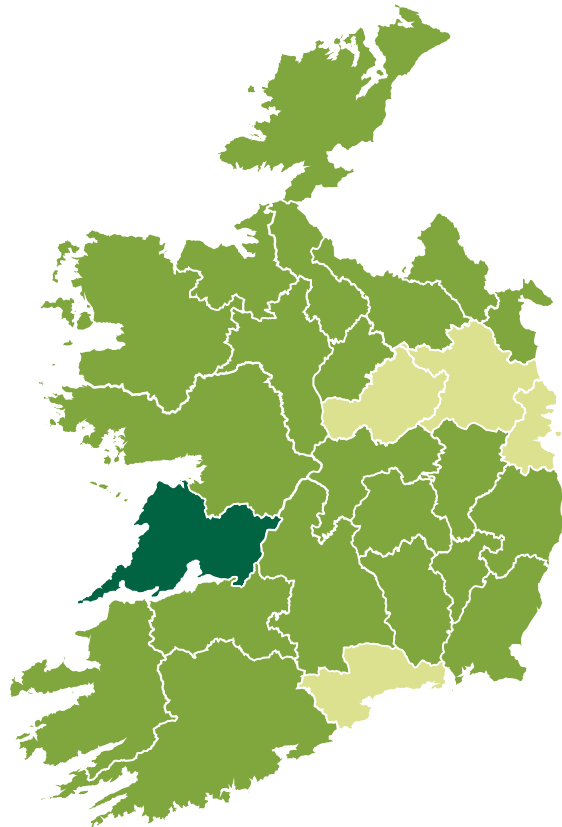
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COMMUNITY

Tourism Approval Rating



International tourism



↑↓ Shows change from Apr - Sep 2021

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

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



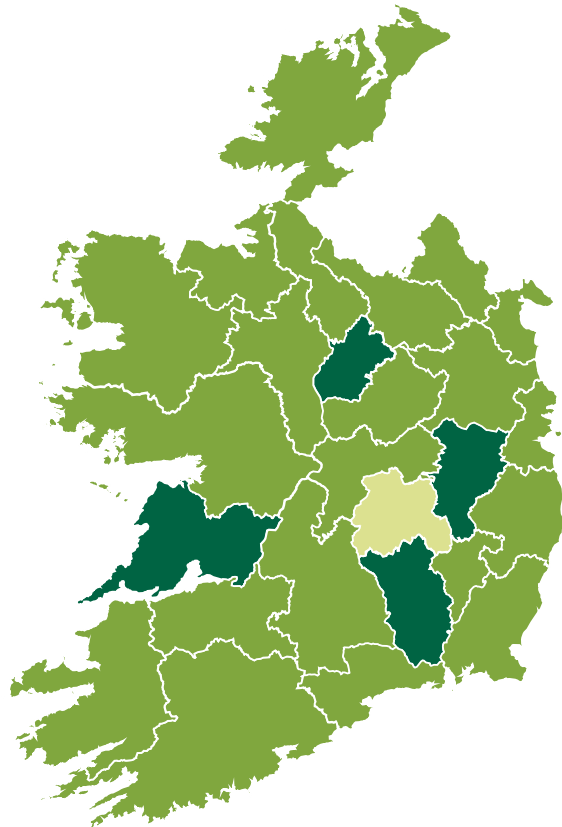
Region	TAR Score
Mid-West	73
Border	71
South-West	67
Mid-East	67
West	67
South East	66
Midlands	63
Dublin	59

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

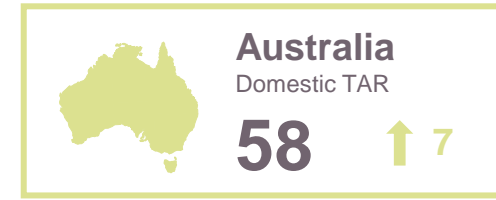
County	TAR Score
Roscommon	67
Kerry	67
Wexford	67
Galway	66
Carlow	65
Louth	61
Laois	60
Dublin	59
Meath	59
Waterford	57
Westmeath	57
None	
None	
None	

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

Domestic tourism



↑↓ Shows change from Apr - Sep 2021



Region	TAR Score
Mid-West	76
Border	73
Mid-East	72
South-West	71
West	70
South East	69
Midlands	67
Dublin	64

County	TAR Score
Longford	83
Kilkenny	81
Clare	81
Kildare	80
Leitrim	78
Tipperary	75
Donegal	74
Limerick	74
Mayo	74
Kerry	73
Roscommon	73
Cavan	73
Wicklow	72
Monaghan	71
Cork	71

County	TAR Score
Sligo	70
Offaly	70
Galway	68
Waterford	67
Carlow	67
Louth	67
Meath	67
Westmeath	67
Wexford	65
Dublin	64
Laois	58
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%

 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%

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

 Managing Tourism	7%
Public consultation and collaboration	3%

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

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

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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

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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



Brian O'Flynn
Regional Development



**Fáilte
Ireland**

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IAE RTDS 5 Strategic Objectives



1

Motivate the domestic and international consumer to visit Ireland's Ancient East.

2

Provide the visitor with more reasons to stay, increasing the economic impact of tourism in Ireland's Ancient East.

3

Ensure the region is easy to access, navigate and consume.

4

Enable and assist the industry to grow its capacity and capability to ensure that it can thrive and create sustainable jobs in local communities.

5

Build committed stakeholder and industry partnerships to guide sustainable destination development.

Disrupting Visitor Flow



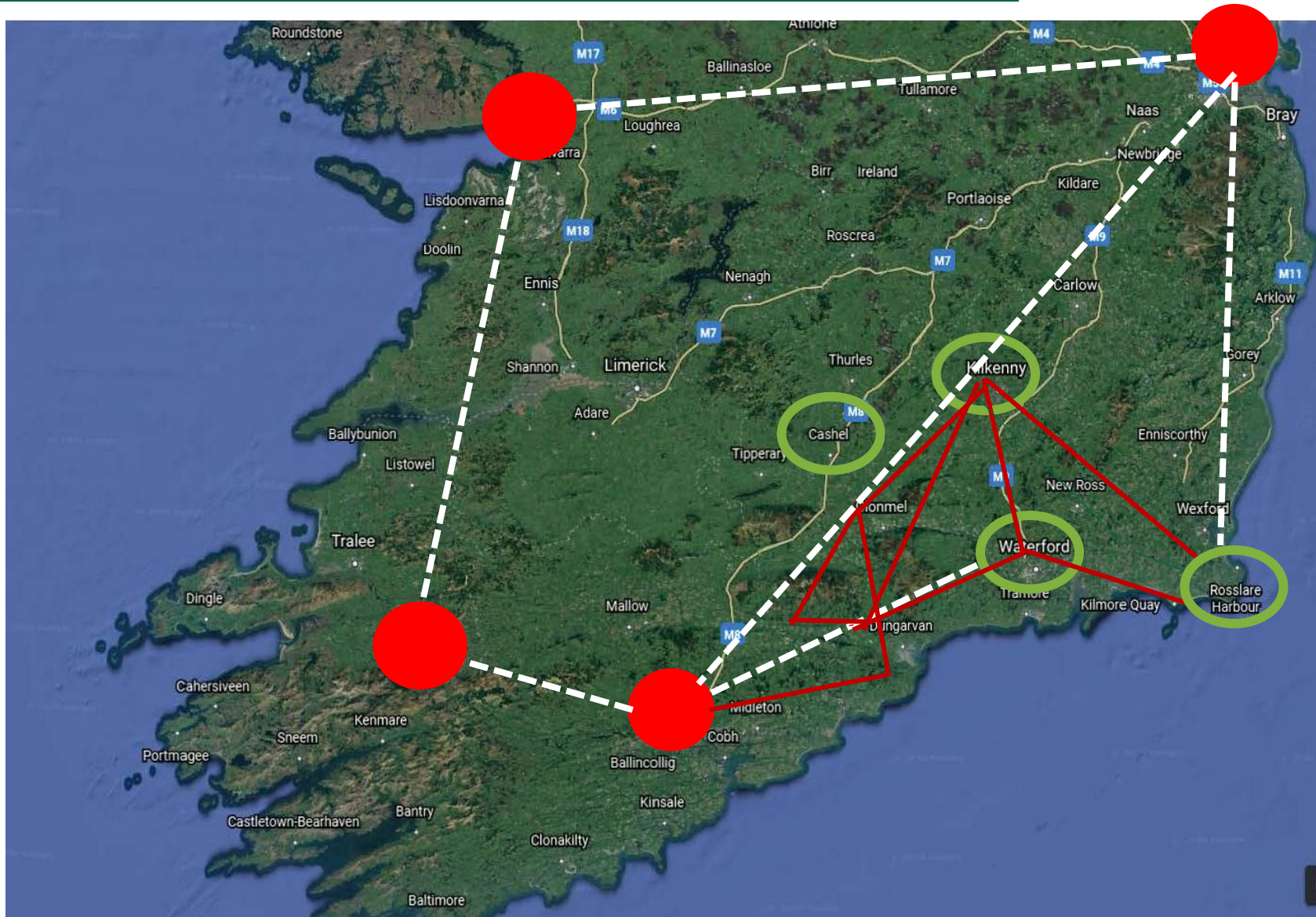
Rail Link



Bus Links



National Road Network



Dublin Airport



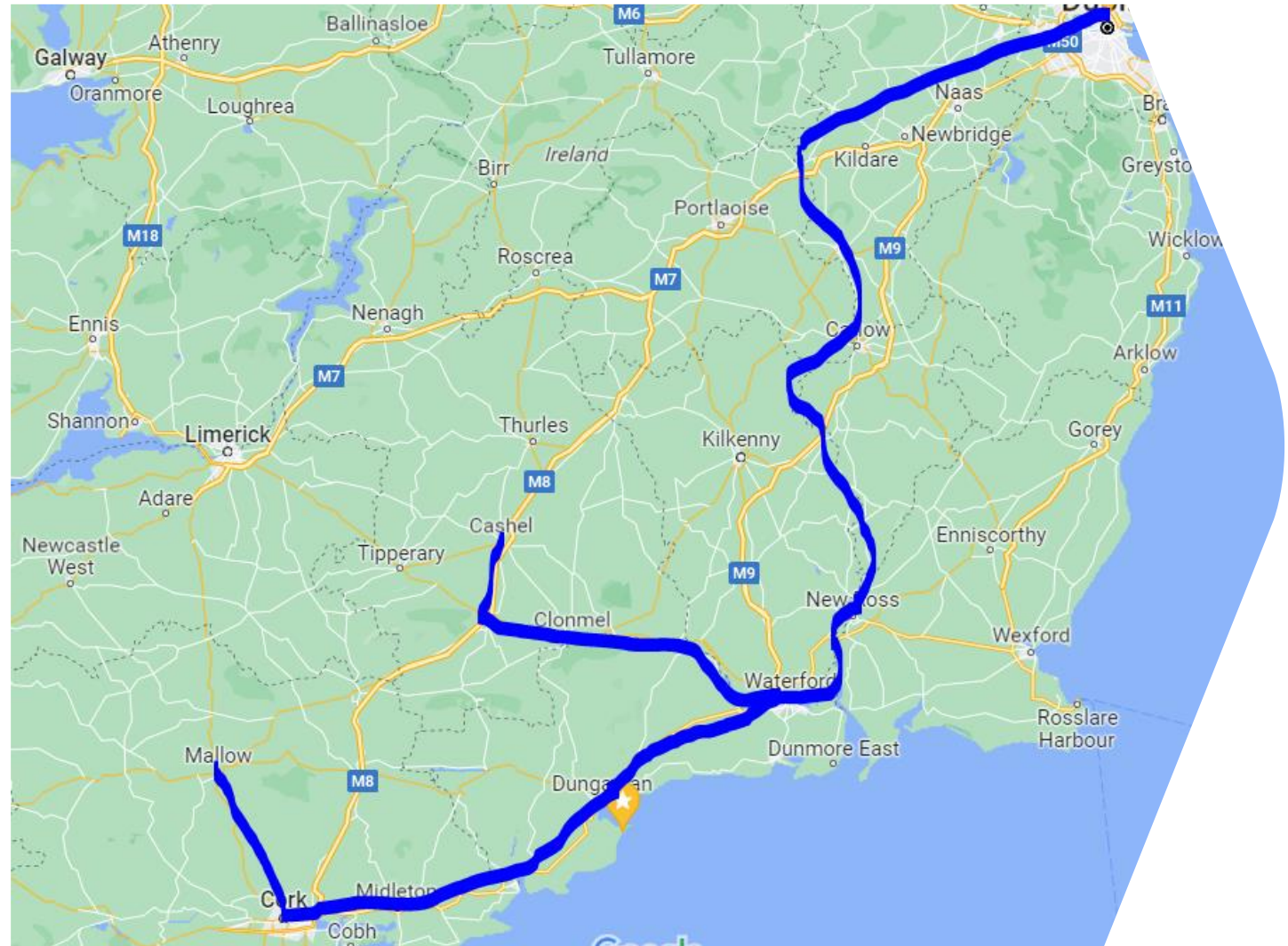
Cork Airport



Waterford Airport

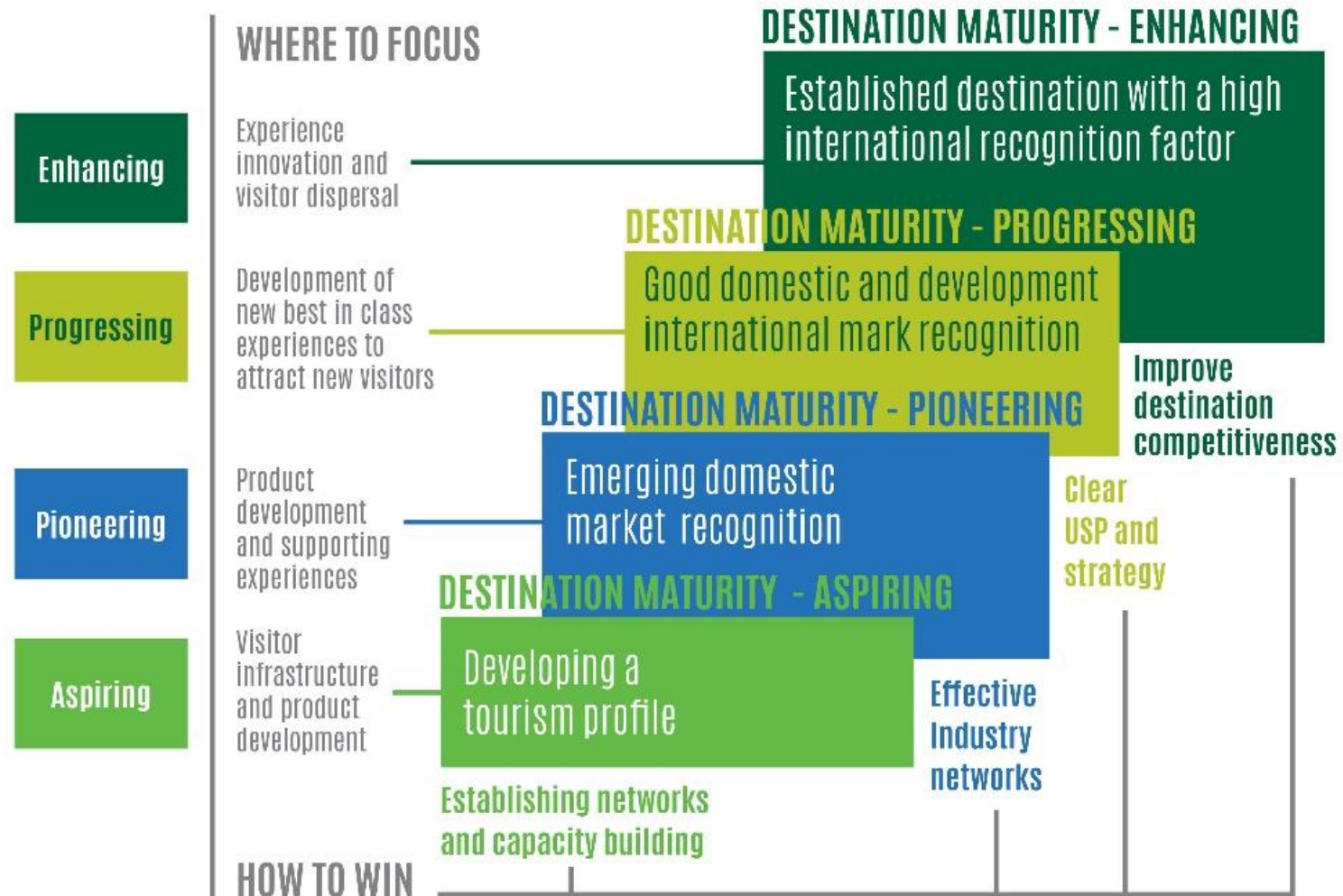


Rosslare Ferryport
>1 Hour



3 Ensure region is easy to access, navigate and consume.

Destination Development Framework



What are the Aims of a DEDP?



- 5 year sustainable tourism development plan aligning all stakeholders
- Focus on the strengths of the area
- Identify projects that will make a difference
- Maximise their opportunity for success

- Motivate visitors to visit, stay and spend
- Extend the season
- Disperse visitors across the destination
- Generate economic return for the area



DESTINATION PROPOSITION



SHARED VISION



STAKEHOLDER ALIGNMENT



COMMUNITY ENGAGEMENT



ACCOMMODATION



VISITOR EXPERIENCES



PRODUCT INVESTMENT



EVENING ECONOMY



SAFETY



BUSINESS TOURISM FACILITIES



SKILLED WORKFORCE

DISTINCTIVE DESTINATIONS



VISITOR INFORMATION AND CUSTOMER SERVICE



FOOD & DRINK



RETAIL



FESTIVALS & EVENTS



MANAGED PUBLIC REALM



SIGNAGE & ORIENTATION



ENVIRONMENTAL QUALITY



VISITOR INFRASTRUCTURE & FACILITIES



ACCESS FOR ALL



ACCESS & TRANSPORT



SUSTAINED SALES & MARKETING

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Waterford DEDP

2023 Launch



What the Plan addresses



1

Outdoors

- Trails
- Coast
- Mountains

2

Visitor Orientation

- Visitor Flow & Interpretation in the City
- Visitor Orientation across the county
- Attraction of Scale

3

Industry Cross Promotion

- Cluster Development
- Local Experts
- Digital that Delivers

Waterford 2023 Projects



Increase Dwell time in
Waterford City

Viking Triangle



Collaboration and Cross
Promotion

Mount Congreve



Cluster Development:
Coast
North Waterford /
Tipperary

Visitor Orientation



Mountains

Suir

Greenway

Blackwater

Copper Coast

Pilgrim Way

Visitor Orientation

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Kilkenny

2023 Launch



What the Plan addresses



1

Orientation

- City Orientation
- Connecting the City and County

2

International market

- Industry focus
- Greater number of experiences

3

Creativity

- Arts
- Design & Crafts
- Evening Economy
- Festivals & Events

Kilkenny 2023 Priority Projects



Tholsel & Medieval
Mile Museum

Kilkenny International
Sales Focus

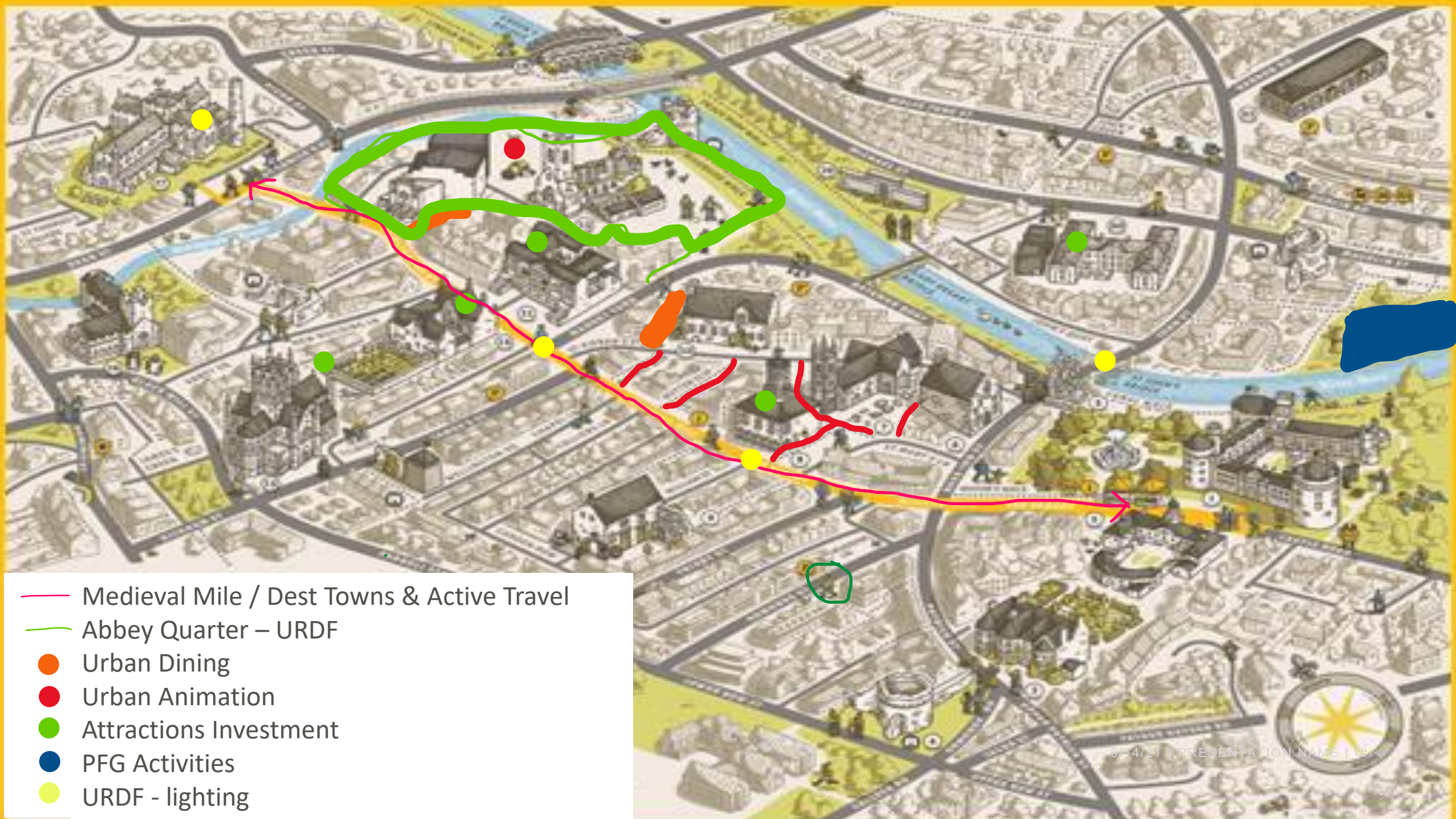
Activation of Creative
Sector

South East Greenway

Outdoors - Rivers

Kilkenny Orientation
and animation





- Medieval Mile / Dest Towns & Active Travel
- Abbey Quarter – URDF
- Urban Dining
- Urban Animation
- Attractions Investment
- PFG Activities
- URDF - lighting

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Wexford DEDP

2023 Launch



What the Plan addresses



1

High Season Destination

- Coastal County Perception
- International Recognition

2

Visitor Attractions

- Great Variety
- Investment needed

3

Opening the Outdoors

- Coastal experiences
- Adventure experiences

4

Year round towns

- Public realm enhancements
- Visitor Experiences

Wexford 2023 Priority Projects



New Ross &
Hook Peninsula

Rosslare
opportunity

Wexford Town
Outdoor Dining
Project

Curracloe
Activity Centre

Norman
New Ross

Hook Lighthouse

Irish National
Heritage Park



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Tipperary

2023 Launch



What the Plan addresses



1

Convert high volumes of day time visitor numbers into overnight stays

2

Opening the Outdoors

- Suir
- Mountains
- Greenways

3

Increase the number of tourism experiences

Tipperary 2023 Priority Projects



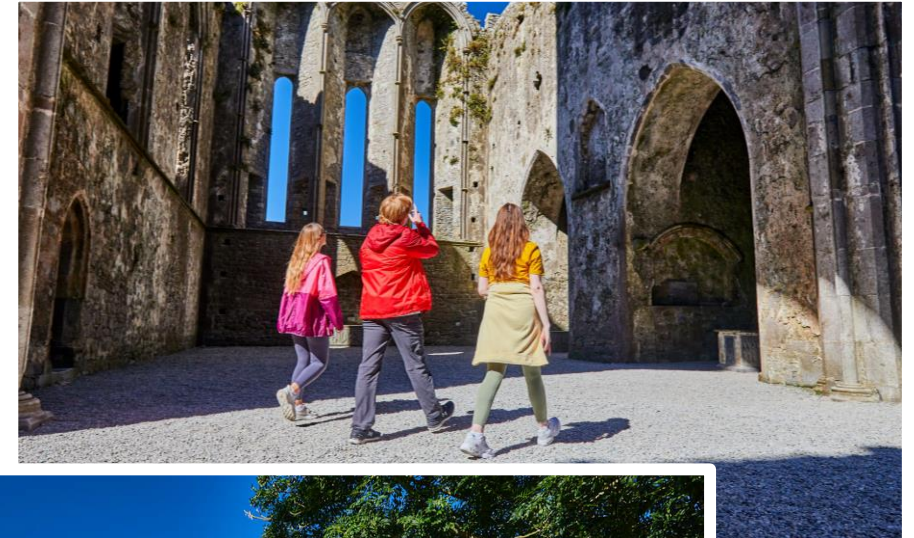
Tipperary
DEDP

Cashel

Opening the
Outdoors

Just Transition

Thoroughbred
DEDP



Thoroughbred Country



DEDP

Destination
Development
(Supply)

Thoroughbred Trail
(Enablers)

Thoroughbred Country
Entity
(Demand)

Digital – websites and
distribution
New Saleable
Experiences
Capability and Capacity
Building

Design of trail
Visitor facing trail/
infrastructure
Industry Clusters

Member based
Trade shows
Bespoke tour
management
Marketing

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Carlow



Carlow 2023 Priority Projects



Initiate DEDP

Garden Product

Opening the Outdoors

Barrow Tourism Masterplan

Carlow Destination Town



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Laois



Laois 2023 Priority Projects



Initiate DEDP

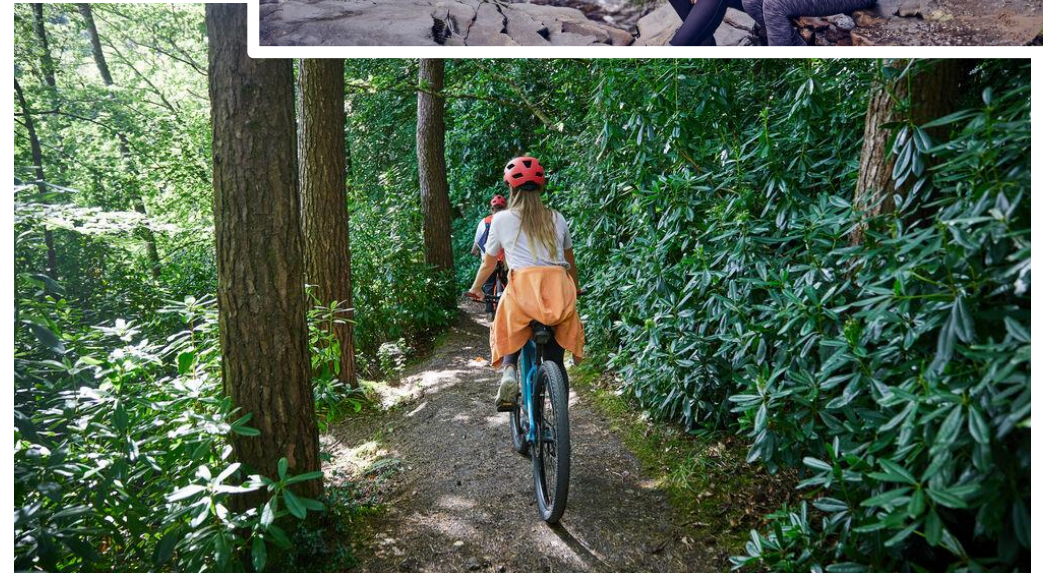
Destination
Towns &
Outdoor Dining

Barrow Tourism
Masterplan

Slieve Bloom

Just Transition

Cross Selling /
Collaboration



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Rory McCarthy

**Product Development
Manager**

**Product
Development**



Laying the foundation for future Success



Beyond the Trees, Avondale



Co. Wicklow

Fáilte Ireland Funding: €6,124,000

Total Project Costs: €19,500,000

Opened: July 2022

Mount Congreve



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



Co. Waterford
Fáilte Ireland Funding: €940,000 + €260,000
Total Project Costs: €7.1m
Opening : March 1st

Slieve Blooms Mountain Biking Centre



Co. Offaly & Co. Laois
Joint RRDF Project with Coillte
Total Project Costs: €13.68 million
Expected Opening Date: 2024 - 2025

Wexford Attraction Development Programme



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



Co. Wexford

Total Funding: €9.3 million

RRDF: €5.56 million

Wexford CoCo / Fáilte Ireland: €3.76 million

The Medieval Kilkenny Experience



Co. Kilkenny

Fáilte Ireland Funding: €3,204,414

Total Project Costs: €4,575,616

Expected Opening Date: 2024

Watersports Facilities



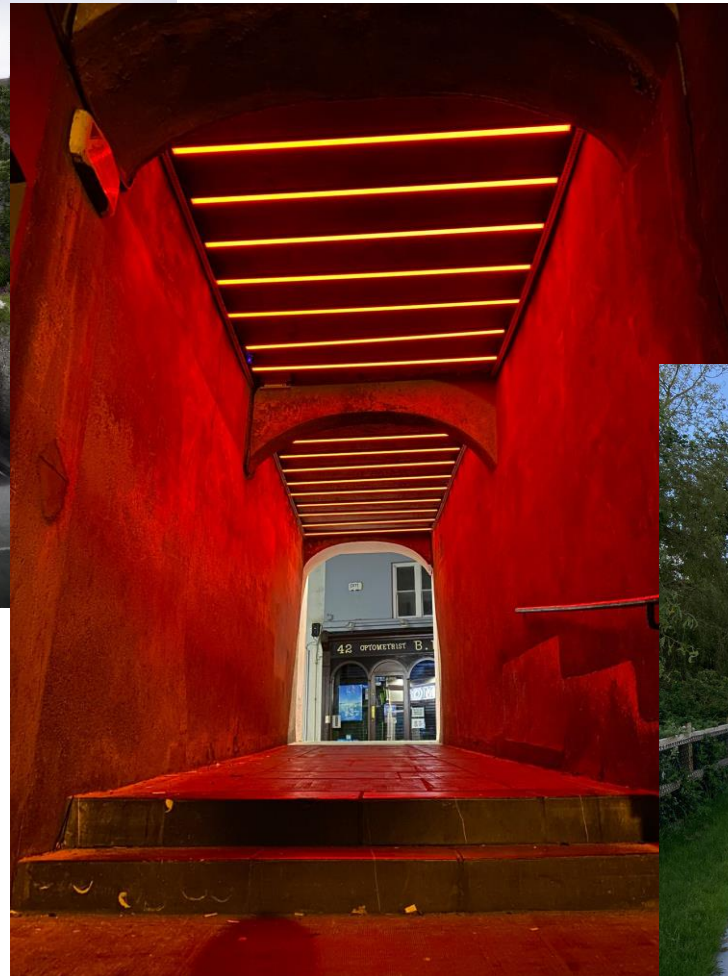
Multiple Counties

Fáilte Ireland Funding: €4,250,000

Total Project Costs: €4,250,000

Expected Opening Date: 2023 - 2025

Driving Economic Impact



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Enterprise Supports



2022 Supports



469 Businesses

1,114 Employees

from *Ireland's Ancient East* businesses attended Fáilte Ireland training events in 2022

Most popular Programme Areas:

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



96% noting better business decisions as a result

2023 Challenges



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Employer Excellence Programme



Employer Excellence To Date in Numbers



170

Businesses
registered to date

2,100

People Managers
completing the
Fundamentals of People
Management Learning

20,000

Tourism and Hospitality
employees positively
impacted by the Employer
Excellence Programme

2023 Tourism Careers Employer Excellence Plan



Roll Out Employer Excellence Certification to participating businesses



Launch Micro Programme for businesses with fewer than 20 employees



Host Employer Excellence Gala Awards Event April 2023



Comprehensive Communications Campaign
raising awareness and encouraging participation



Targeted support for businesses to drive implementation of action plans

Fáilte Ireland new Online Learning Platform



learn*i*FI





Launching
Mid-March
2023

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



Competitiveness



+



+



**Reducing
Costs**

**Increasing
Revenues**

**Exceptional
Customer
Value
Experiences**

2023 Strategic Priorities



Cost Reduction and business efficiencies

- To reduce Costs
- To drive efficiencies
- To deliver VFM and great customer experiences



Digitalisation

- Increase customer reach and engagement
- Drive sales & spend 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

National Schedule & Support Hub



Sales and
Marketing

Digital Marketing
Skills

HR Supports

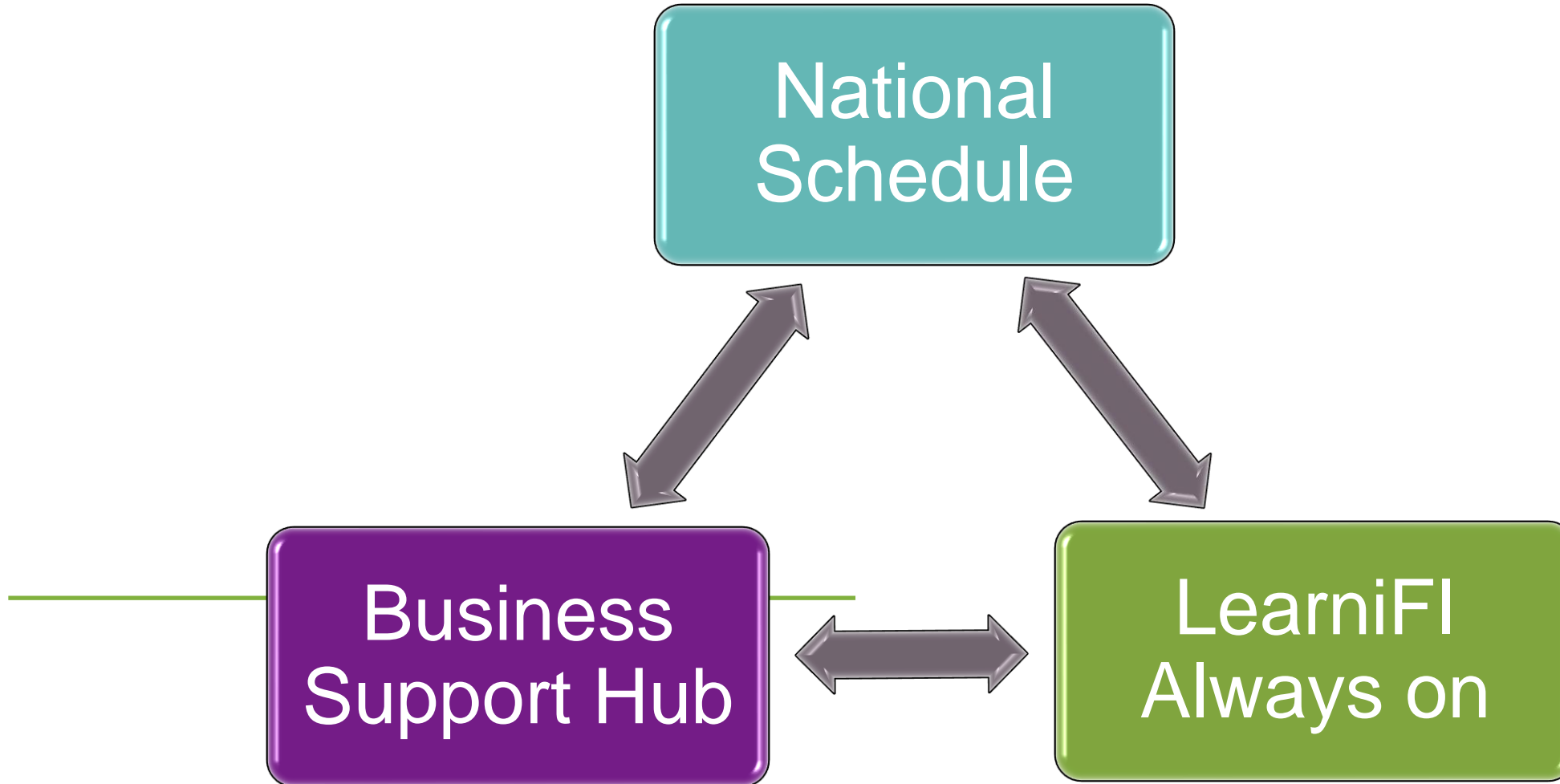
Revenue
Generation

Accessibility in
Tourism

Energy, Water and
Food Waste
Reduction

Finance

Engaging with Supports



So our ask of you...



1. Sign up to the Climate Actions and Excellent Employer Programme
2. Engage with supports to drive your business growth
 - Speak to your local contact for further information on the programmes available to support your business in 2023
 - Engage with 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 platform to support your teams development



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Jenny Finegan

Marketing Overview



Kilkenny, Carlow, Laois, Tipperary,
Waterford, Wexford



Communications Journey



CATEGORY BUILDING

THINK ABOUT GOING

Making Ireland salient in the minds of the domestic audience

Role: Inspiration

REGIONAL EXPERIENCE BRAND



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

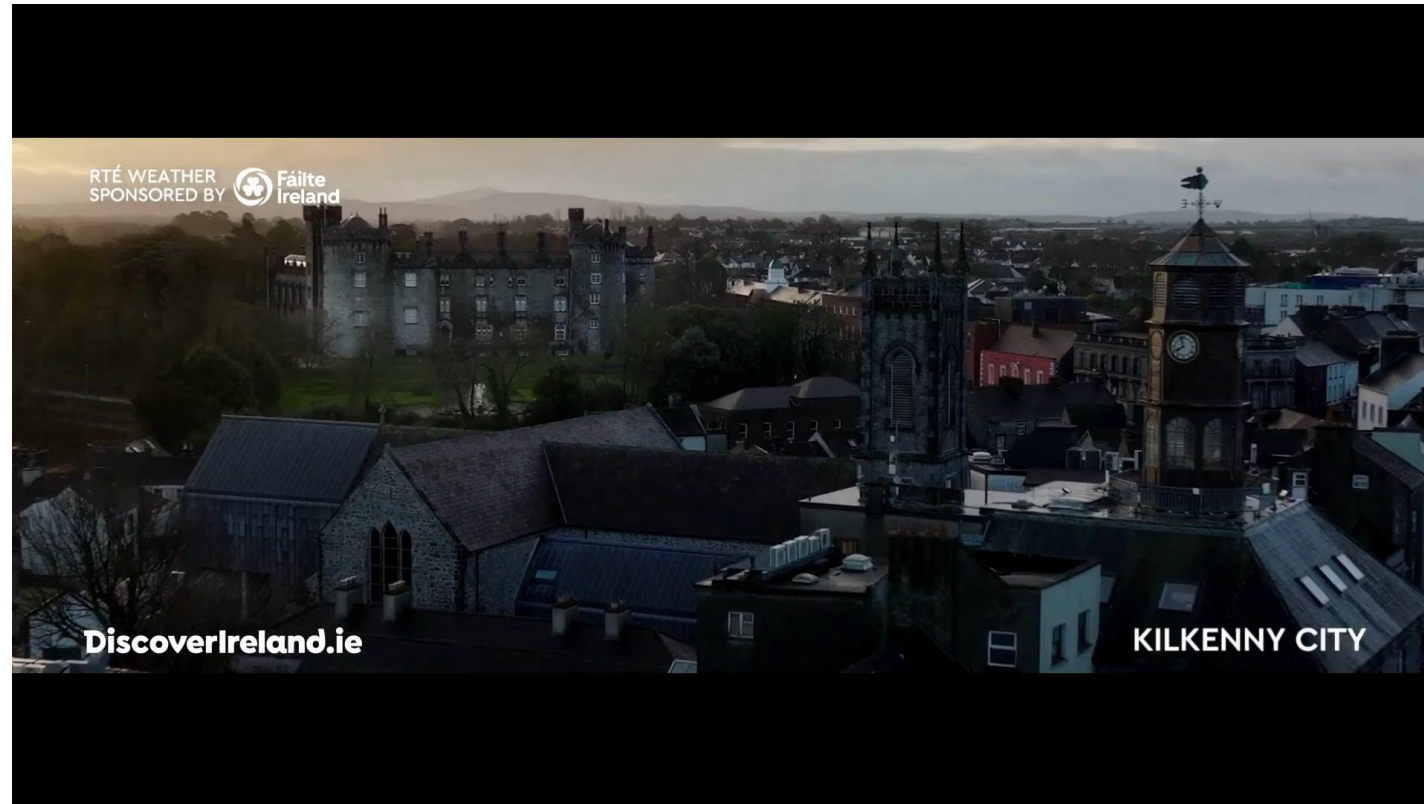
TG4

4

sky

Utv

Building salience through Ireland's largest broadcast sponsorship



120
Stings per week

1.6 Million
Average
Weekly Reach

8.4
Average Weekly
Frequency

Driving national reach via audio & press



National radio targeting ROI & NI



Online audio for extended reach



Keep Discovering Laois

Sliabh Bloom Mountains
WWW.SLIEVEBLOOM.IE
TEL: 086 831 0034
From gentle woodland strolls to high-octane mountain bike trails, the oldest mountains in Europe offer a haven for lovers of the outdoors.

Rock of Dunamase
WWW.DISCOVERIRELAND.IE/LAOIS/ROCK-OF-DUNAMASE
Perched high on a hilltop, soak up incredible views from this iconic fortress while uncovering captivating stories about Vikings, Cromwell and Strongbow.

Laois Garden Trail
WWW.LAOISGARDENS.IE

Barrow Navvies
WWW.WATERWAYSIRELAND.ORG/PLACES-TO-GO/BARROW-NAVIGATION
Follow the ancient towpath along the stunning Grand Canal and River Barrow, exploring hidden gems at an easy pace, on foot, by bike or by horse or boat.

Keep Discovering Tipperary

Brookfield Farm
WWW.BROOKFIELD.FARM
TEL: 084 855 1509
As well as guided talks on beekeeping and honey tasting, Brookfield Farm will play host to Field Exchange this summer, welcoming visitors and more to come together and exchange ideas to help combat climate change.

Killaloe River Cruises
WWW.KILLALOE.RIVERCRUISES.COM
TEL: 086 814 0539
A trip aboard the Spirit of Killaloe offers a taste of the slower life along the stretch of the River Shannon and Lough Derg. Departs daily from the twin towns of Ballina/Killaloe.

Keep Discovering Carlow

Boattrips.ie
WWW.BOATTRIPS.IE
TEL: 087 3041999
Take a boat trip on the River Barrow and immerse yourself in nature & heritage with this fantastic outdoor adventure for all the family.

Duckett's Grove
WWW.CARLOWTOURISM.COM/ DUCKETTS-GROVE
TEL: 059 9130411
Duckett's Grove with its towers, beautifully restored Walled Gardens and playground make it one of the most photogenic attractions in Carlow.

Mackstairs Eco Trails
WWW.BLACKSTAIRSECOTRAILS.IE
TEL: 059 9773184
Gold accredited sustainable tourism business offering guided Nature Walks, Foraging, Hiking or Walking Tours of Ireland.

The Columban Way
WWW.CARLOWTOURISM.COM/ THECOLUMBANWAY
TEL: 059 9130411
The Columban Way weaves from Mount Leinster through a stunning, natural countryside, along riverside pathways and vibrant communities.

Timahinch Castle and Weir, Timahinch, Co. Carlow

For great things to see and do, visit **DiscoverIreland.ie**

Keep Discovering
IRELAND'S ANCIENT EAST

The joy of an extra day to spend your way. Where will you explore this October Bank Holiday Weekend?
Waterford Greenway

DiscoverIreland.ie

Driving relevancy through digital and social

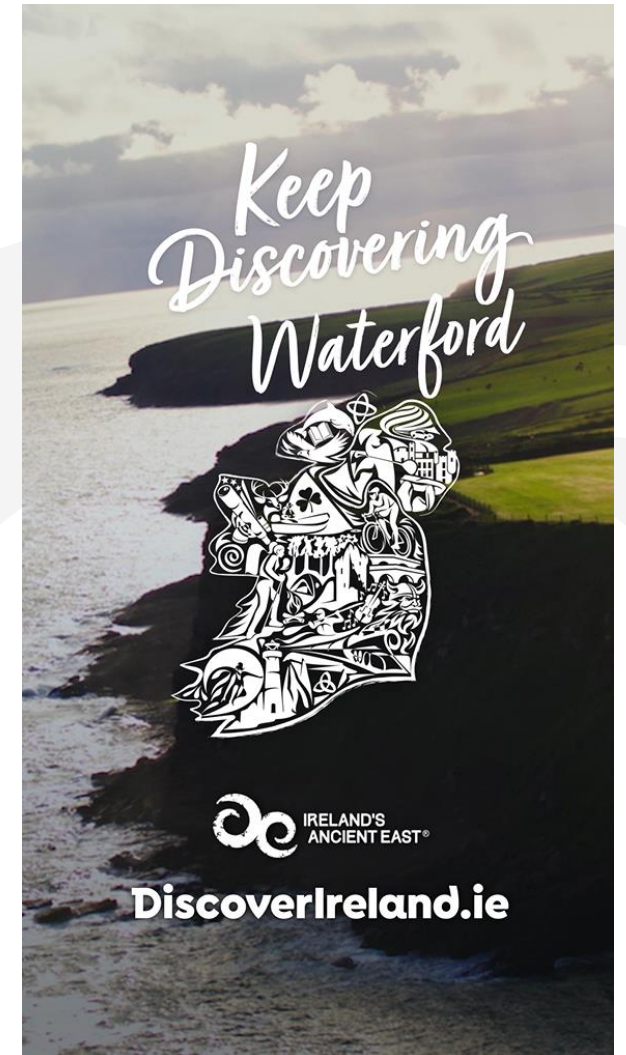
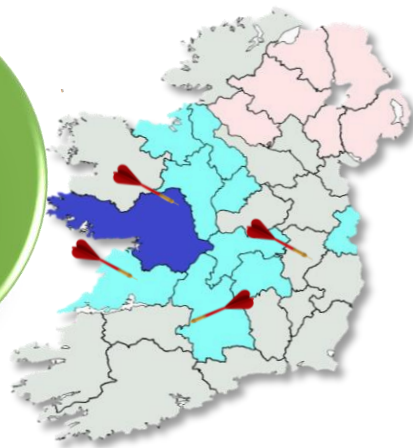


Geo-targeted ads

Within 2-hour radius

Always-on social

YouTube



Showcasing experiences via TV Partnerships...



159K
Reach
per segment

12
Weeks



130K
Reach
per segment



In association with



1.6M
Total
Partnership
Reach

...and Digital Partnerships



Lovin.ie



22 Weeks
58 items
of content



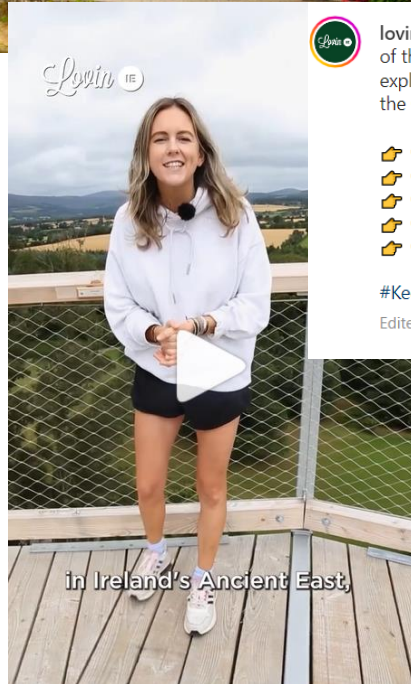
View profile



Planning your next getaway? Here are 6 fun family activities to try this summer



This Autumn discover coastal wonders, scenic hikes, island adventures or incredible city breaks. Your next adventure starts here.



lovindotie Planning your next staycation? There's no shortage of things to do around Wicklow in Ireland's Ancient East. Cassie explored everything from Beyond The Trees and power biking, to the Chester Beatty Inn and Clara Lara Fun Park

- @beyondthetreesavondale
- @chester_beatty_inn
- @claralara_funpark
- @fatbikeadventures
- @storeandyard

#KeepDiscovering, @irelandsancienteast
Edited · 22 w

5.8M
Total social
Reach



JOE.IE

Kickstart the ultimate Irish adventure with these 90 unmissable attractions and activities



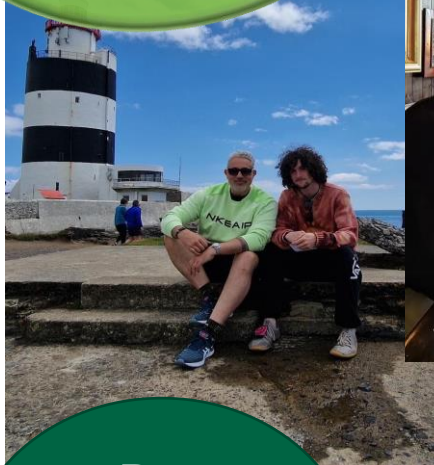
JOE joe.ie 319K followers

View profile

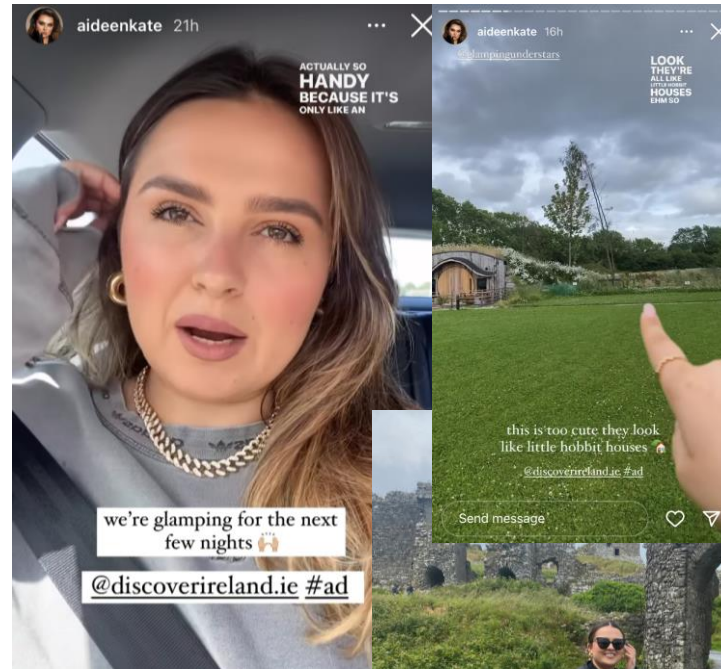
Building positive word-of-mouth through influencers & PR



Influencer Programme Reach 13.5M +



Baz Ashmawy Reach 180K+



Aideen Kate Murphy Reach 340K+



Press Reach 16M +

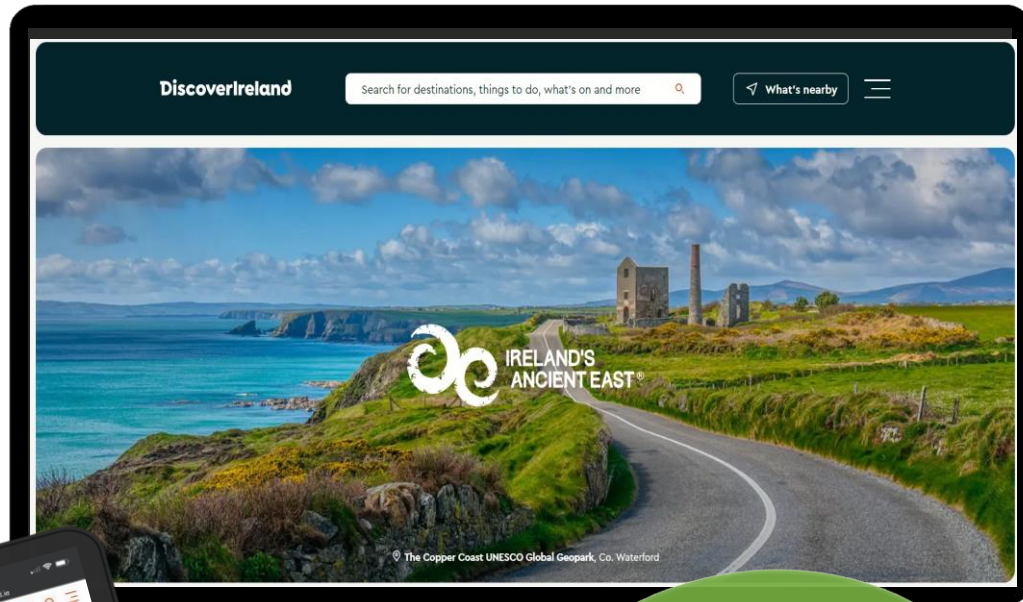


RTE Guide Reach 50K+

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



Discover
Ireland.ie



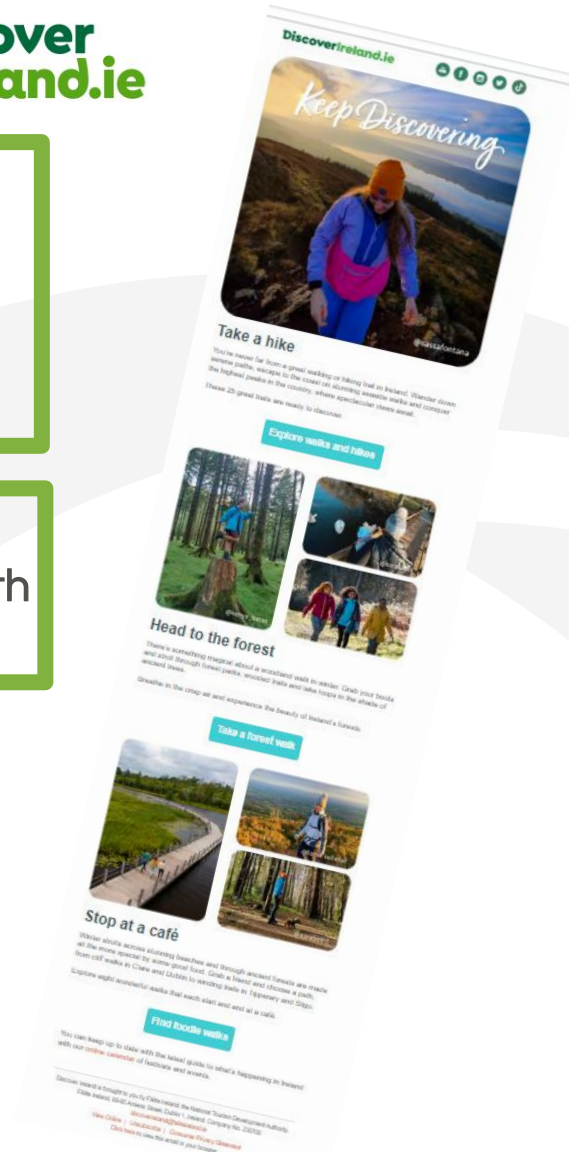
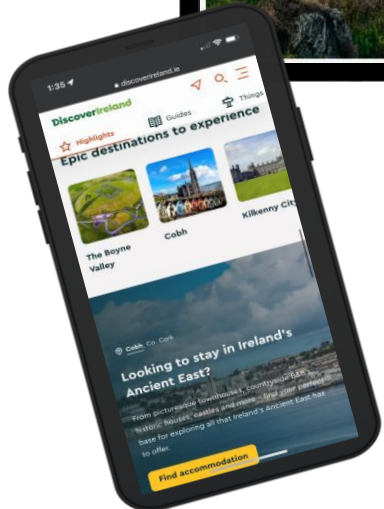
Emails Database: 60K

Open Rate: 30%

Published Twice a month

564,170
Sessions

89,772
Referrals



Building communities on Social Media



1.5M
Community Size



4.3%
Average Engagement Rate

Top Performing Posts



Kilkenny Views - 16k



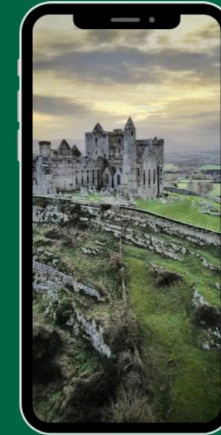
Carlow Views - 20k



Laois Views - 5k



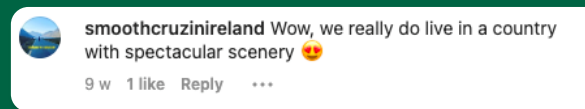
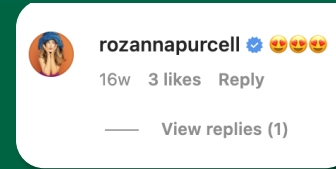
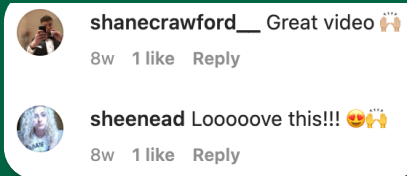
Waterford Views - 12k



Tipperary Views - 21k



Wexford Views - 34k



3.2M

Total Impressions



DRIVING
SUSTAINABLE
Recovery

How you can get involved



Keep Discovering Industry Toolkit



Free
Marketing
Content



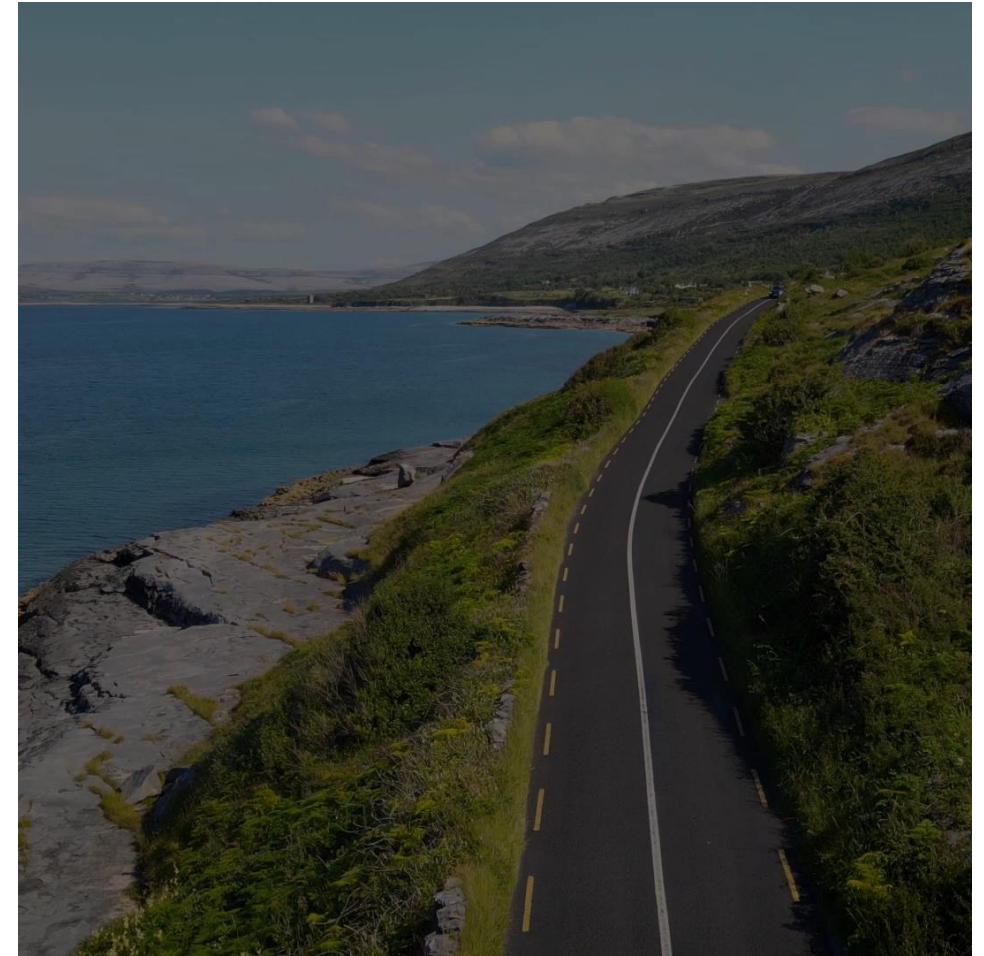
Save
Time



**UPSKILL AND
GET PRACTICAL
MARKETING
ADVICE**



Save
Money





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

Key Takeaway



Martin Donnelly
Product Sales &
Distribution Manager

**Commercial
Development**



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

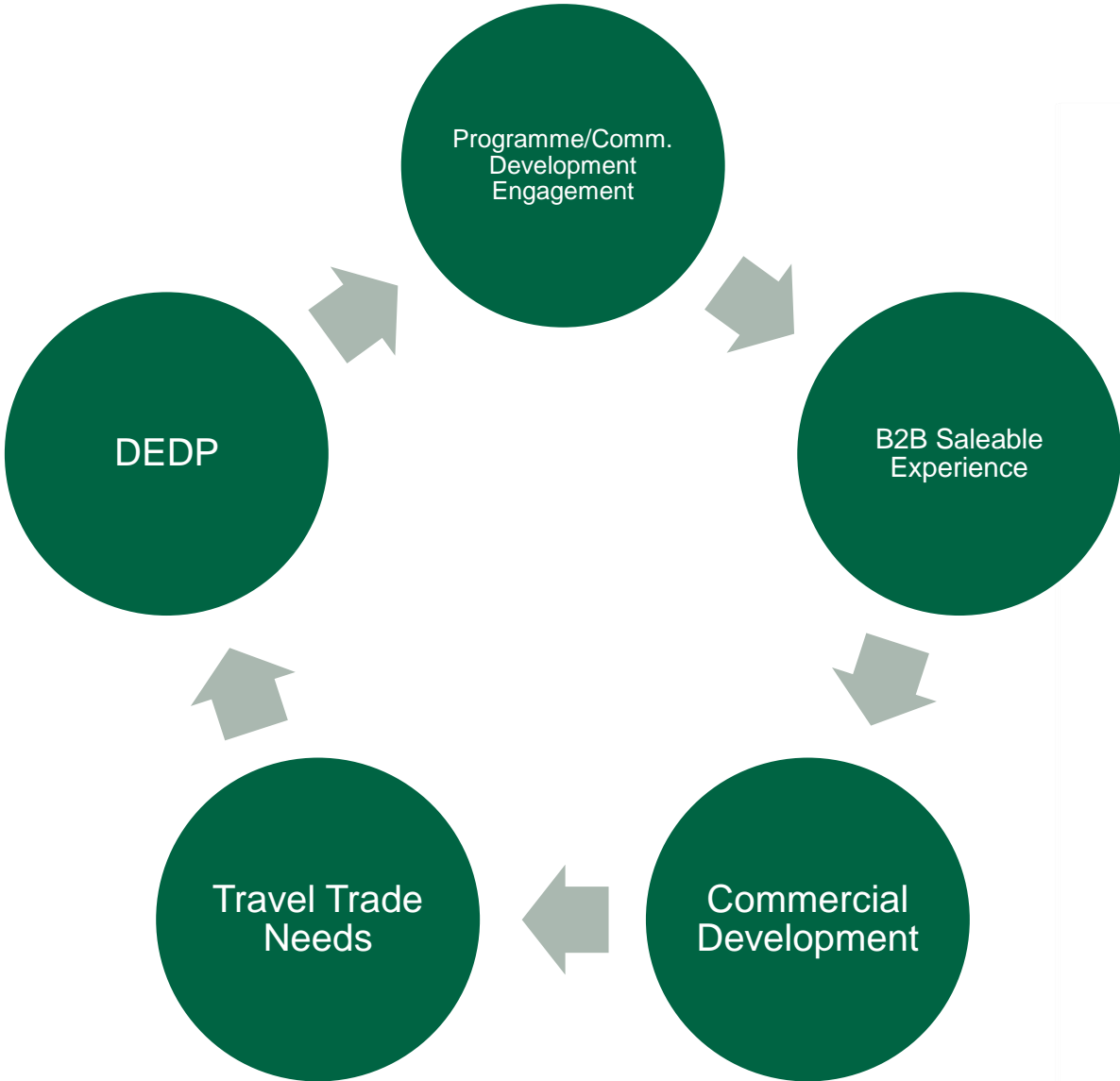


Business Tourism

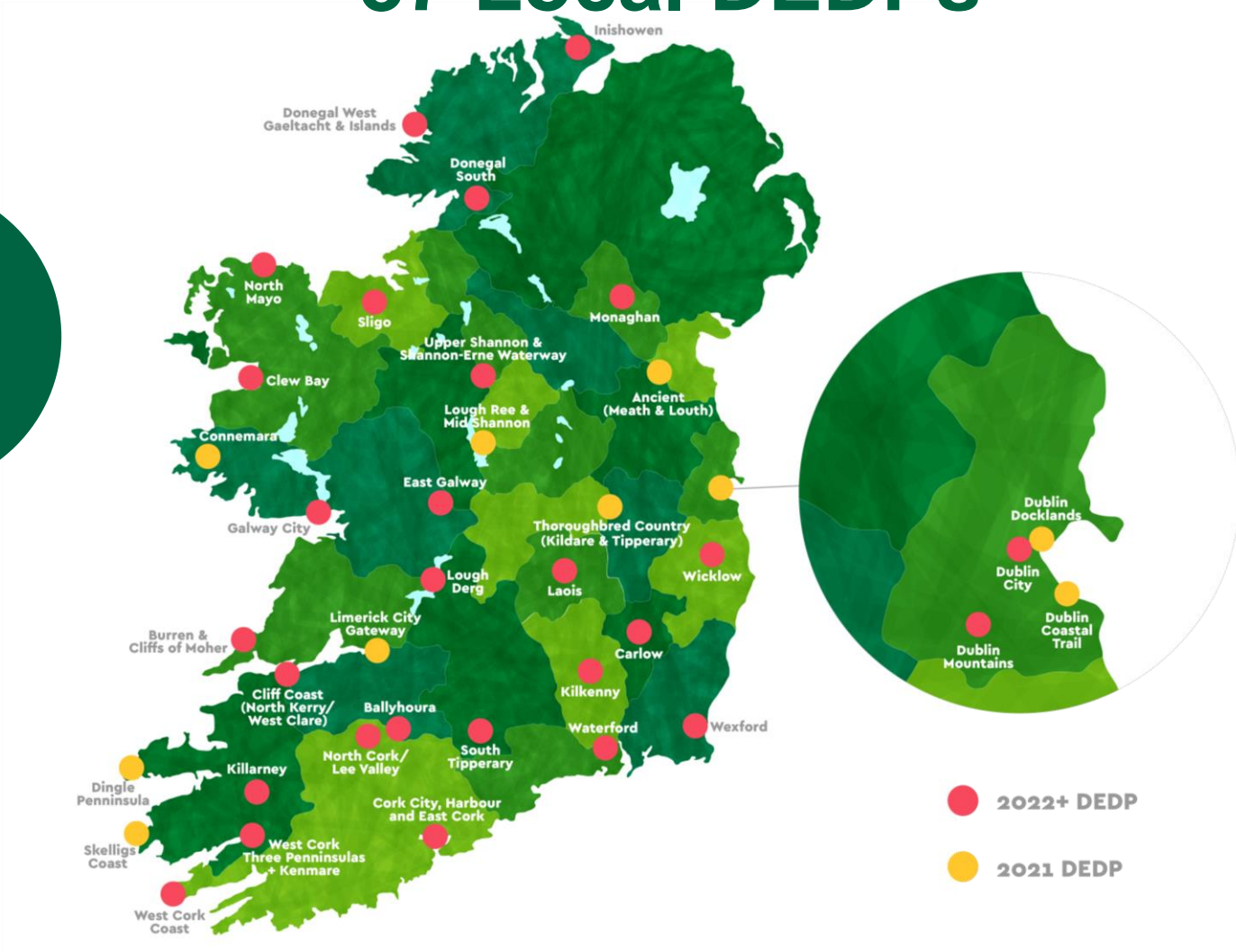
- **€202m** of Events Took Place
- **€271m** of Leads Generated
- **€183m** of Leads Converted
- **€660m** of Leads Added to Pipeline



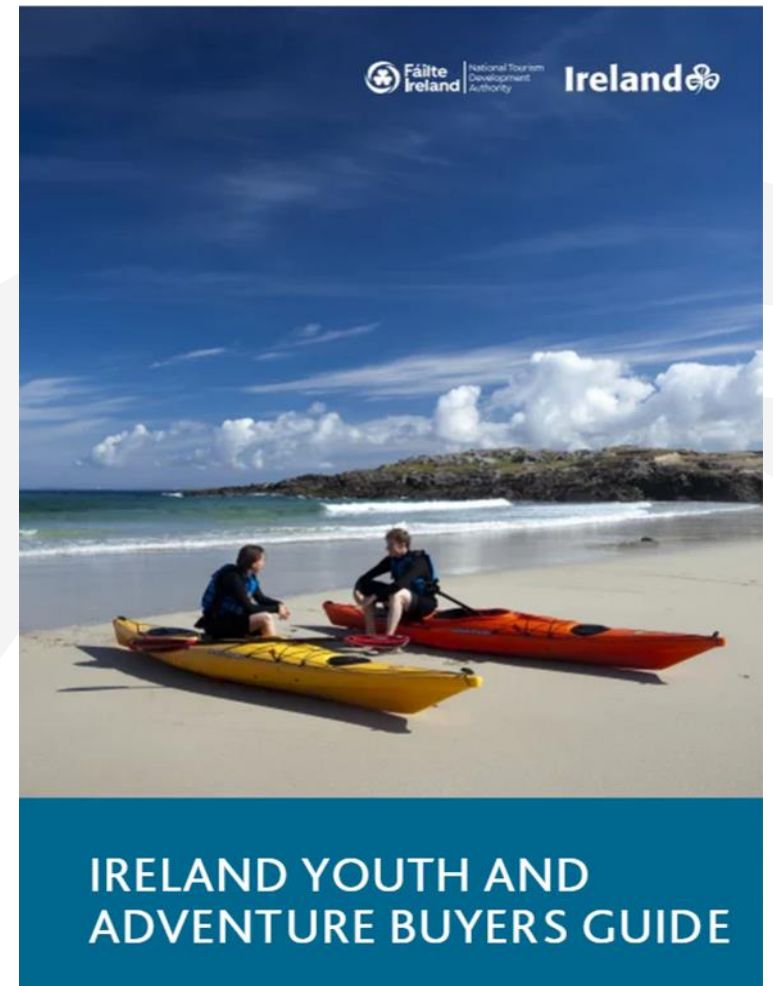
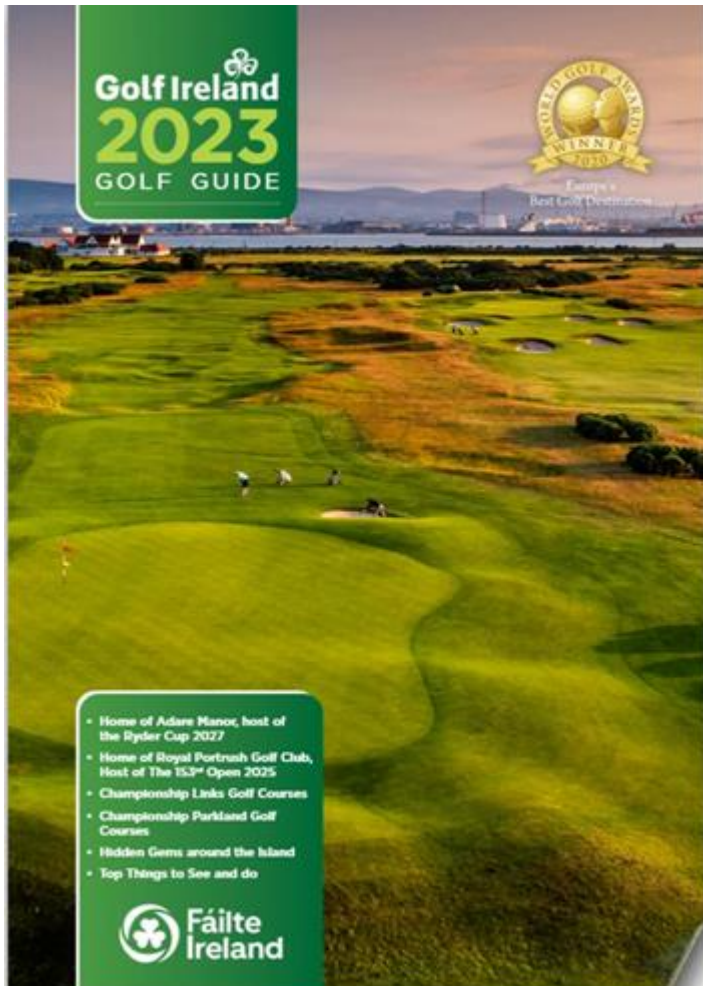
B2B Saleable Experiences



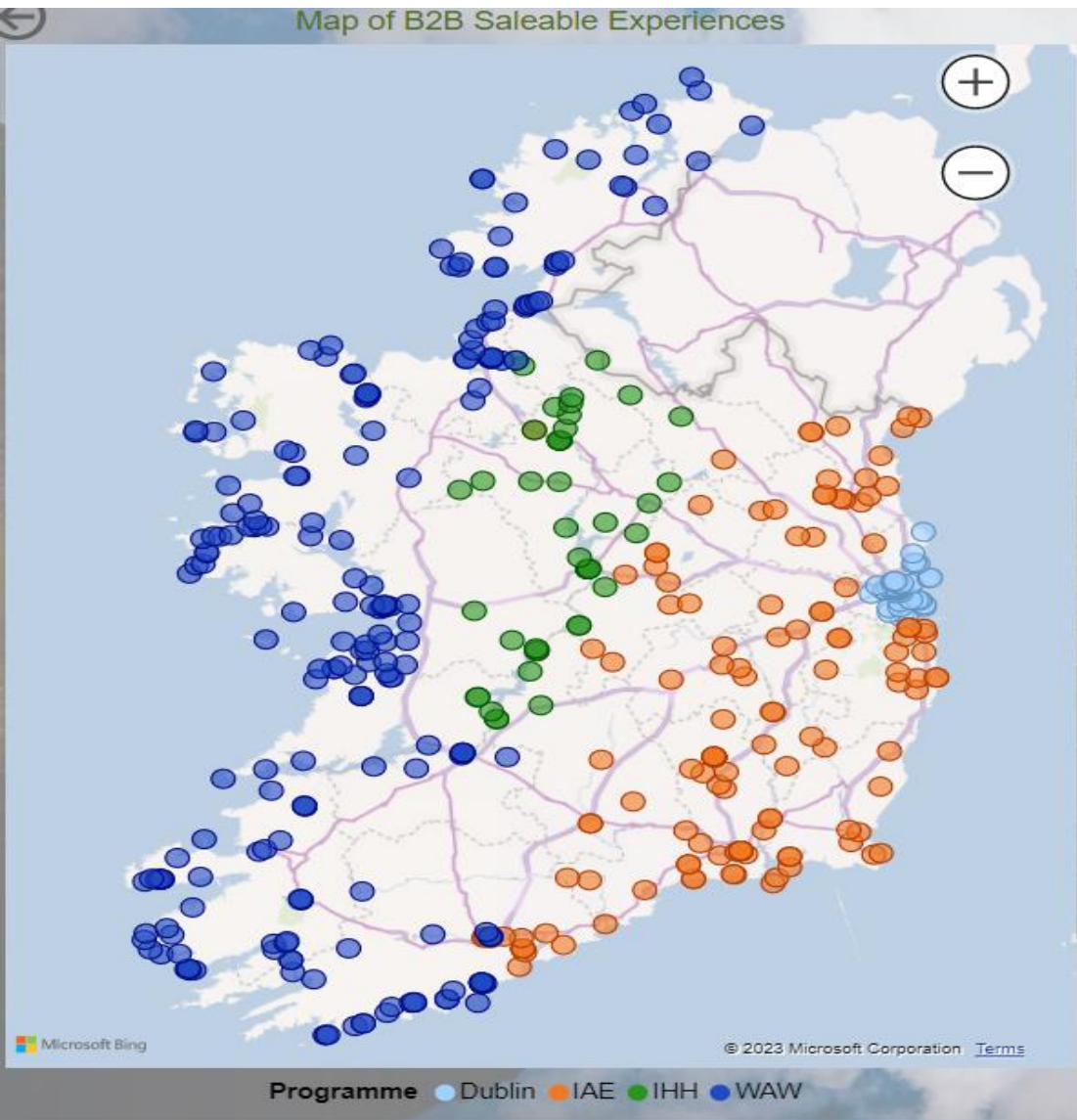
37 Local DEDPs



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



266
Buyers



490
Industry



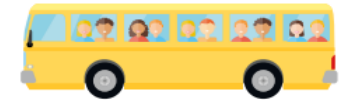
15
Markets



12,480
Estimated Contracting
Opportunities



10
Meitheal Fams



IN-IRELAND CONTRACTING OPPORTUNITIES

44

fams & targeted networking events



CONTINUING OVERSEAS RECRUITMENT IN CONJUNCTION WITH TOURISM IRELAND...

across multi-markets for
50
in-market events



8 IN-IRELAND PLATFORMS

Meitheal

GB Coach Workshop

Global Inbound Workshop

IBIA Workshop Series/Leisure and Ultraluxe Roadshow

Clew Bay Event

Belfast Golf Consumer Event

Horizon Irish Open

Golf Ireland Convention



Golf, Luxury & Business Tourism



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

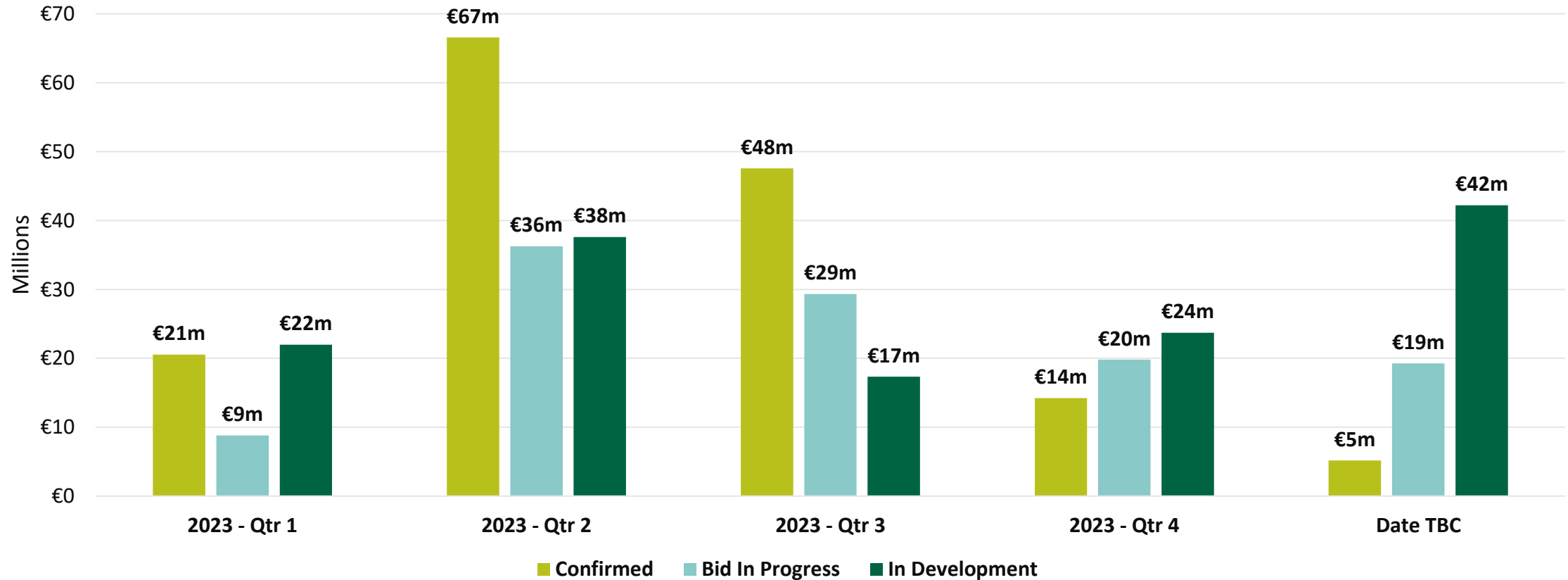
117
Master
Connections

4
Fams
30+ buyers

20
Overseas
sales
platforms

1
Luxury
Destination
Showcase
40 buyers

Business Events: Event Year 2023



€410m
Value Pipeline

€154m
Confirmed (38%)

€113m
Bid Pending (28%)

€143m
Bus. Dev (35%)

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

2

3

4

Consumers

Industry

Destinations

Ireland

Thank you

Ní neart go cur
le chéile

