



DRIVING
SUSTAINABLE
Recovery

Regional Industry Briefing

The Knightsbrook Hotel, Co. Meath

22nd February 2023



Agenda



1

2022 in Review and 2023 Outlook

2

Developing the Region

- RTDS / DEDPs
- Enterprise Supports
- Development Projects

3

Promoting the Region

4

Providing Routes to Market



Paul Keeley
Director Regional Development



**Fáilte
Ireland**

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Topics



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

Section 1:

2022 Review

- Overseas
- Domestic

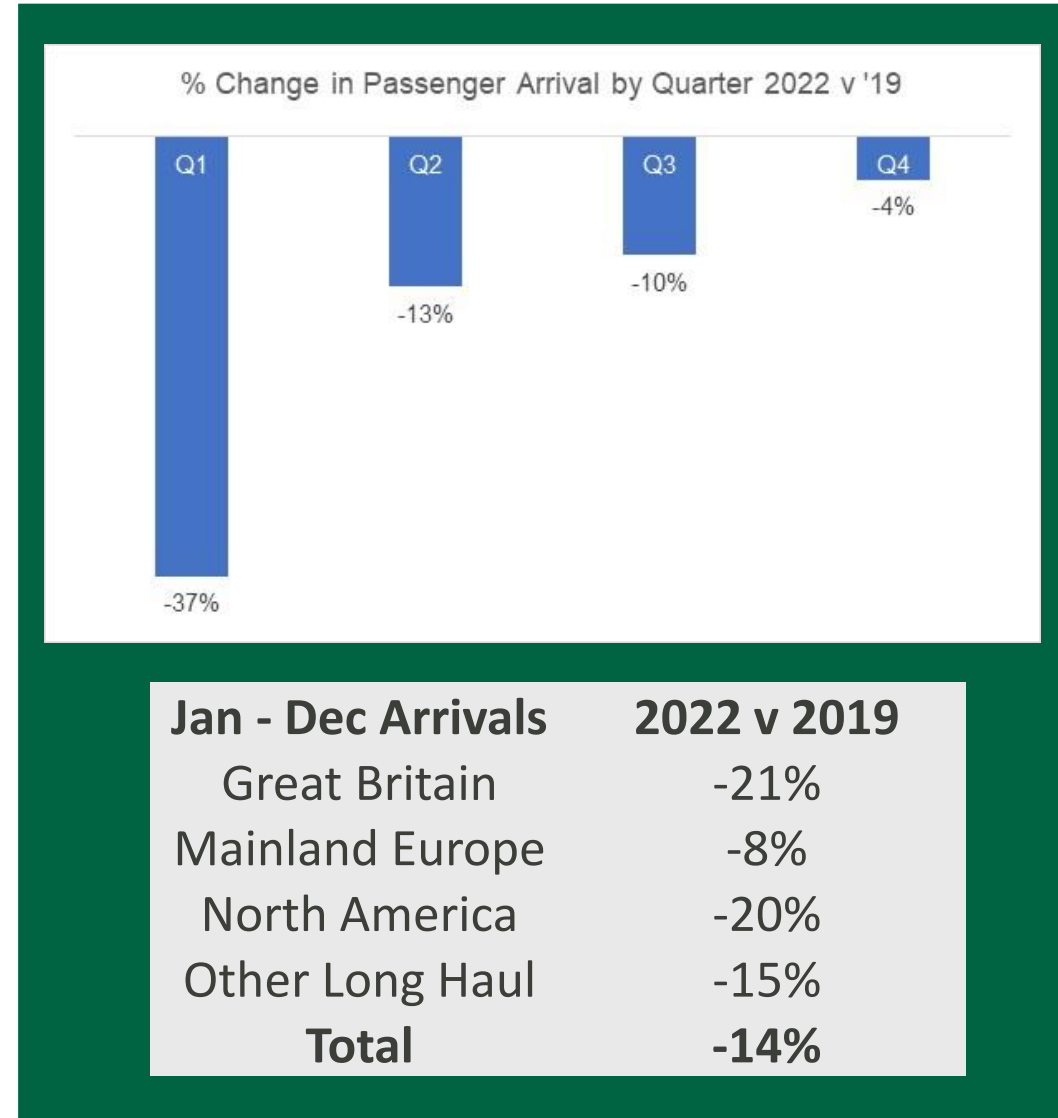
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Overseas Market - Fast Recovery



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



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



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

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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



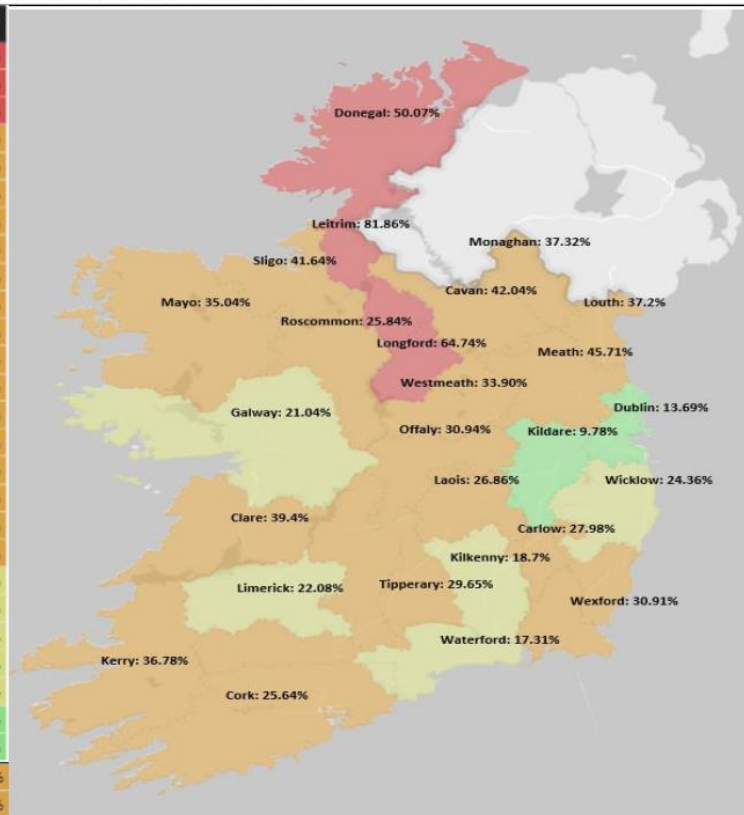
Combined IP and BOTP contracted beds in all Fáilte Ireland registered accommodation

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)



IP and BOTP contracted % of Registered Accommodation

Counties	Registered Beds	Overall Contracted Beds	Overall % of Contracted Beds
Leitrim	794	650	81.86%
Longford	312	202	64.74%
Donegal	9,009	4,511	50.07%
Meath	3,577	1,635	45.71%
Cavan	2,543	1,069	42.04%
Sligo	3,653	1,521	41.64%
Clare	8,435	3,323	39.40%
Monaghan	1,155	431	37.32%
Louth	2,153	801	37.20%
Kerry	18,433	6,780	36.78%
Mayo	7,537	2,641	35.04%
Westmeath	2,758	935	33.90%
Offaly	1,031	319	30.94%
Wexford	4,995	1,544	30.91%
Tipperary	2,594	769	29.65%
Carlow	1,687	472	27.98%
Laois	1,508	405	26.86%
Roscommon	894	231	25.84%
Cork	15,223	3,903	25.64%
Wicklow	4,159	1,013	24.36%
Limerick	6,009	1,327	22.08%
Galway	14,593	3,071	21.04%
Kilkenny	3,958	740	18.70%
Waterford	4,216	730	17.31%
County Dublin, Ireland	55,763	7,635	13.69%
Kildare	3,425	335	9.78%
Total Average Contracted beds across all counties	180,414	46,993	26.05%
Total Average Contracted beds across all counties Excluding Du...	124,651	39,358	31.57%



Sustainability Targets

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Wander Through Time



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

Section 3

A Closer Look At Regional Performance

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VICE Framework



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

VISITOR

Destination Attitude Survey

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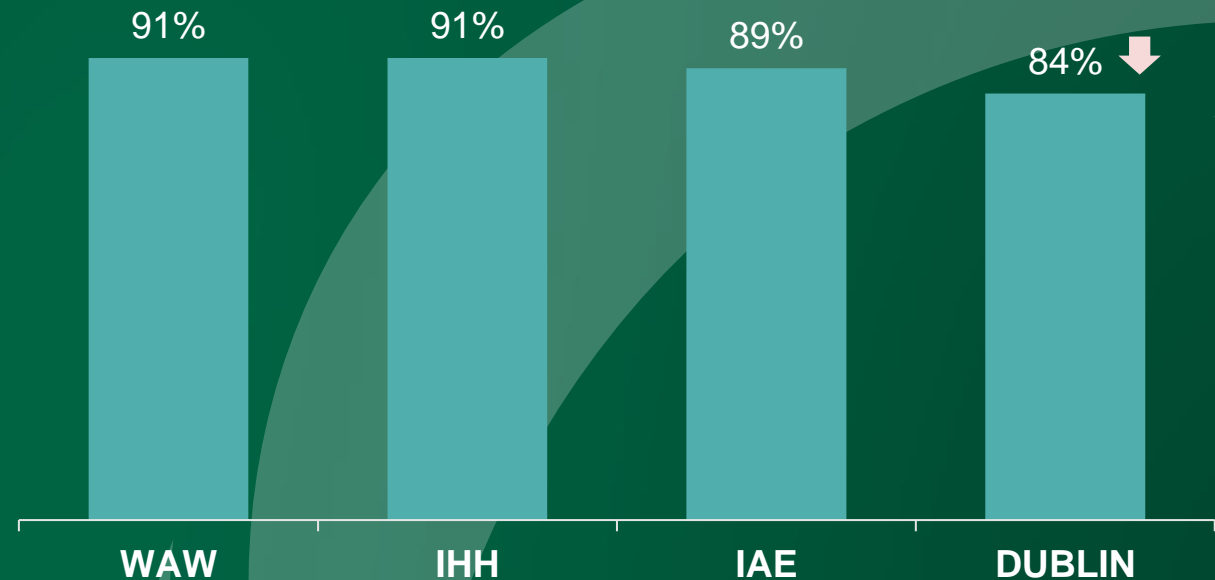
Visitor Destination Attitudes Survey

- 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.)



- 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 daytripping behaviour into the DEDPs, from both domestic and overseas visitors, suggests accommodation hubs outside of areas and a concentration in specific locations.

INDUSTRY

Industry Sentiment

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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

Occupancy and Rates

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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%
Meath**	61	68	-7 ppts	133	98	36%	82	67	22%

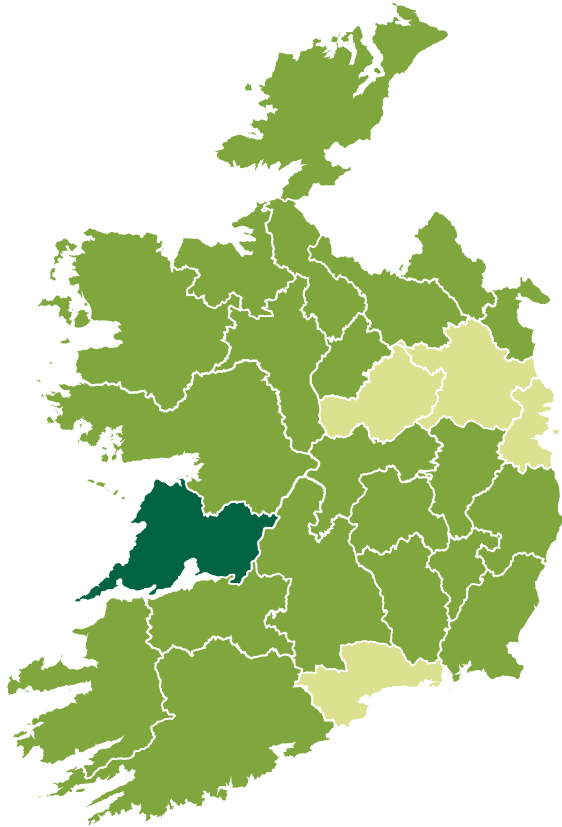
**Minimum sample size

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

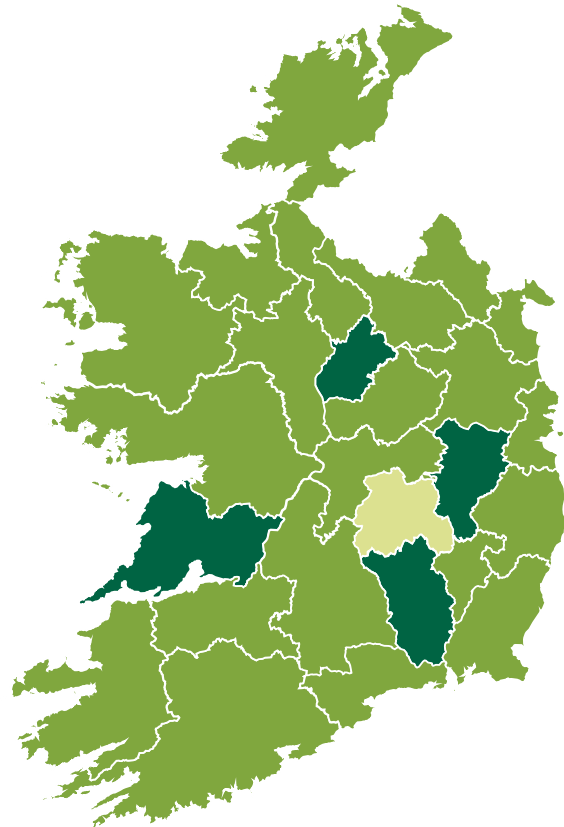
County	TAR Score
Roscommon	67
Kerry	67
Wexford	67
Galway	66
Carlow	65
Louth	61
Laois	60
Dublin	59
Meath	59
Waterford	57
Westmeath	57
None	
None	
None	

- 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

Domestic 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	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

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)

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



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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



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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.

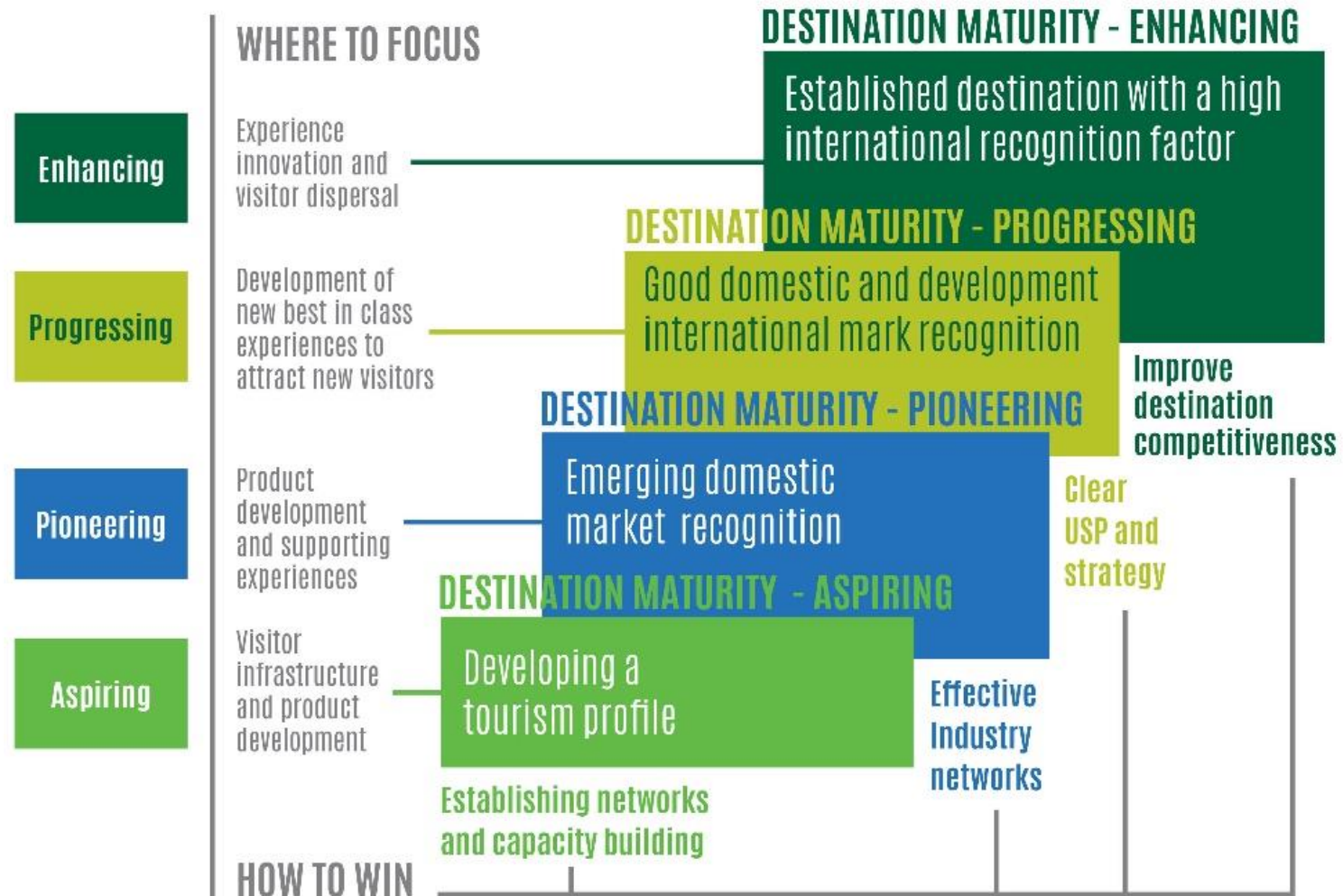
4

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.

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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Ancient DEDP (Meath & Louth)

Launched 2021



What the Plan addresses...



1

Visitor orientation & dispersion

- Boyne Valley Drive
- Cooley
- Food Trails

2

Heritage Proposition

- Leverage UNESCO
- Brand consistency
- Immersive Experiences
- Púca Festival

3

Industry Collaboration

- Cross Selling
- Improved Distribution

4

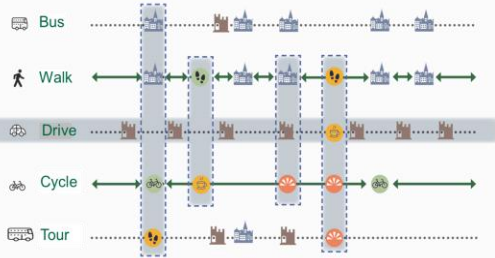
Outdoor Proposition

- Protect and sustain environment
- Develop activity base

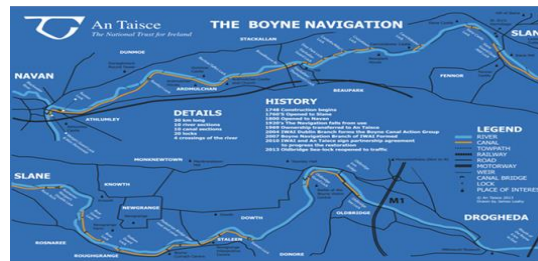
Priority Projects 2023



Re-imagining the Boyne Valley Drive



Boyne Navigation & Greenway



Carlingford Vision '31



Boyne Valley 5000 years of Food Experiences



- Develop Interpretation
- Standardise Branding
- Digital orientation
- Drogheda Gateway
- 5 Industry clusters

- Preferred Greenway route
- Slane Estate Masterplan
- Trim Blueway activation
- Completion of Navan to Kingscourt Greenway

- Development & Orientation Plan
- Táin Trail review
- Ravensdale Masterplan
- Omeath Greenway extension

- Culinary centre of Excellence action plan
- SeaLouth Seafood trail development plan
- Develop Food Experiences

Púca



+320 million

Media Reach

34 million

US Broadcast

39

International Media

11

International Buyers

90%

Reduction in CO2 emissions per day

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Thoroughbred Country (Kildare & Tipperary)

Launched 2022



Thoroughbred Country - What's the strategic intent...



Provide

Provide a tactical plan to address the strategic challenge of harnessing the visitor flow

Address

Address the Green Haze - lack of identity beyond Dublin

Tap

Tap into the emerging potential for Ireland to deliver unrivalled Luxury experiences

Rebalance

- The distribution of international visitor revenues
- 23% of visitors
- 11% of revenue

Connect

Connect Irelands World Class reputation in the Thoroughbred Industry to tourism

Improve

Improve visitors' ability to consume the region – development of the International Thoroughbred Trail

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

Other Kildare Projects 2023



Irish Open 2023

New Shackleton Experience Athy



Royal Canal Greenway + Barrow Blueway

Kildare Town – St. Brigid's Cathedral / Destination Town



Outdoor Dining Naas

Just Transition

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Monaghan



What the Plan addresses...



1

Visitor orientation & dispersion

- Dublin / Belfast Access
- North / South partnerships

2

Industry Collaboration

- Hub focus
- Cross Selling
- Improved Distribution
- New Experiences

3

Outdoor Proposition

- Protect and sustain environment
- Untouched landscape

Priority Projects 2023



Progress visitor proposition for Glaslough

Develop & activate Industry Clusters

Feasibility Study for Muckno Estate

Progress Slieve Beagh Eco Tourism Destination (Shared Island Application)

Completion of Monaghan Destination Town Outdoor Event Space

Align Peace Campus Project with Product & Cluster Experiences



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Wicklow



Wicklow Projects 2023



Initiate Wicklow
/ Dublin
Mountains DEDP

Eco Trail

Avondale Beyond
the Trees

Blessington
Greenway &
Russborough

Glendalough and
Wider Wicklow
Masterplan

Destination
Towns



Glendalough and Wider Wicklow Masterplan

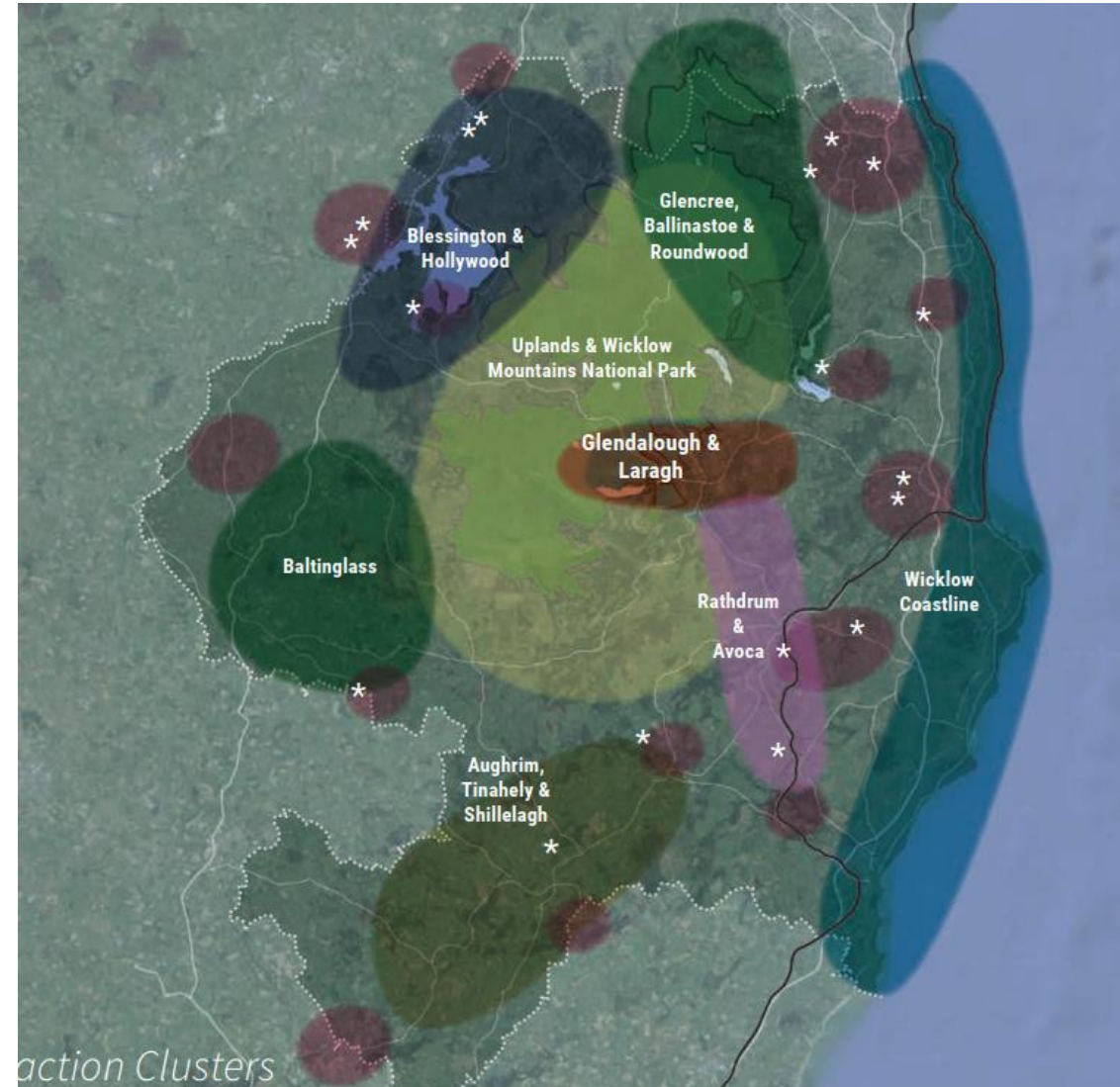


What is your experience of Glendalough?



Aims of the Plan:

1. Enhance the natural, built and cultural heritage
2. Disperse the benefits and impacts of tourism
3. Improve the visitor experience



Enterprise Supports

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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



Employer Excellence Programme

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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 Plans



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

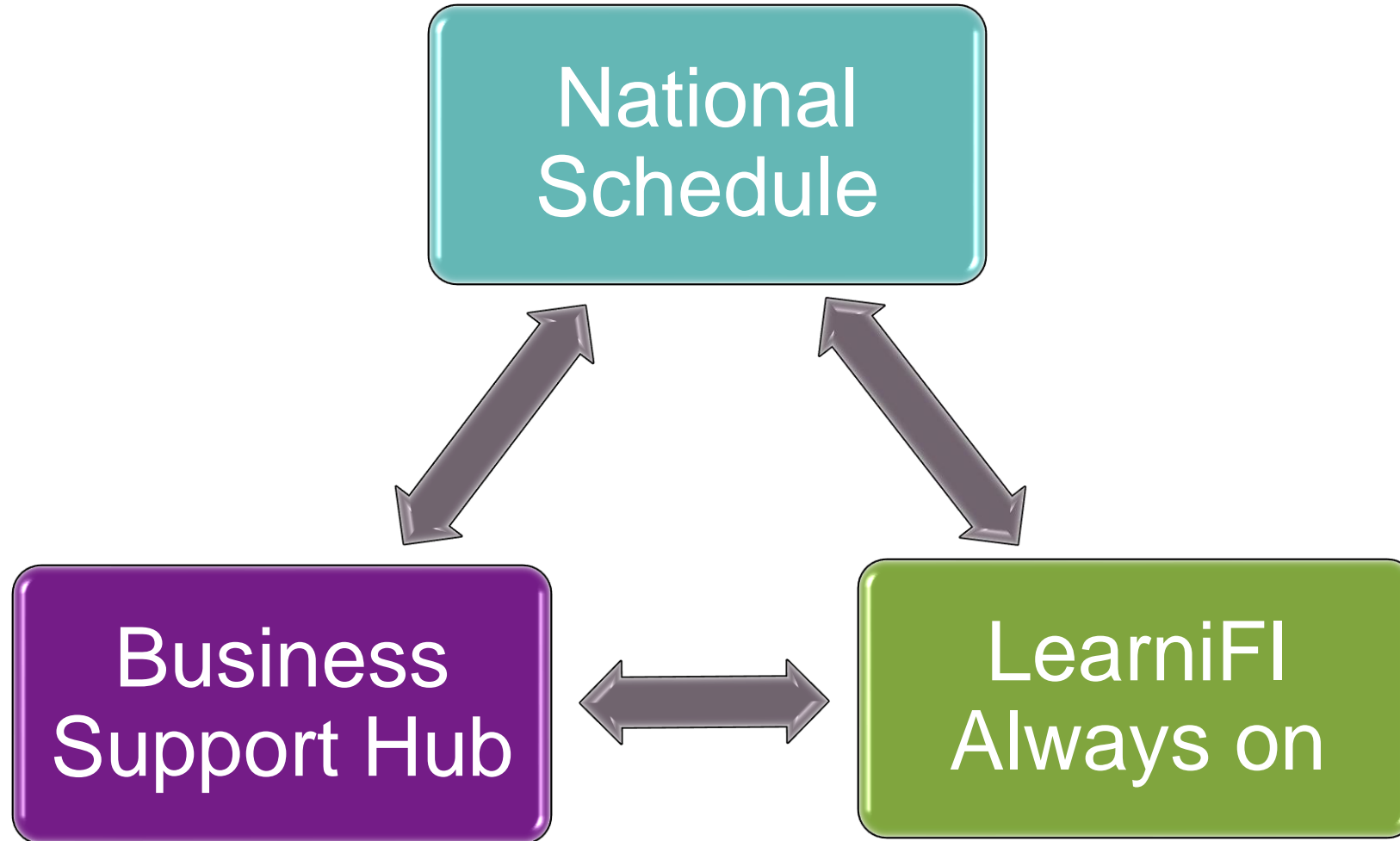
Revenue
Generation

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
1. Encourage your staff to upskill and engage with the New learni**FI** – always on learning **to support your teams** (Launching March)



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Emma Woods
Head of Marketing Communications

Marketing Overview

Ireland's Ancient East

Louth, Monaghan, Meath, Kildare & Wicklow



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



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



Fáilte Ireland

Keep Discovering

IRELAND'S ANCIENT EAST®

Trim Castle, Co. Meath

DiscoverIreland.ie

Keep Discovering Monaghan

IRELAND'S ANCIENT EAST®

Rossmore Forest Park
WWW.MONAGHANTOURISM.COM/
LISTING/ROSSMORE-FOREST-PARK
TEL 047 8122

Enjoy way-marked walks through lush parklands, encompassing playpark, towering giant sculptures and remnants of Rossmore's historic estate.

Concra Wood Golf & Country Club
WWW.CONCRAWOOD.IE
TEL 042 974 9465

A jewel in Co. Monaghan's golfing crown and considered to be one of Ulster's best golf courses with a spectacular 340-degree view over its surroundings.

Rally School Ireland
WWW.RALLYSCHOOLIRELAND.IE
TEL 047 89098

Push your driving skills to the limit in Monaghan, at Ireland's premier motorsports facility, attracting motorsports pros as well as A-list thrill-seekers.

Patrick Kavanagh Centre and Kavanagh Trail
WWW.PATRICKKAVANAGHCENTRE.COM
TEL 042 937 8560

Pay tribute to one of our best-loved poets at the impressive Patrick Kavanagh Centre in Inniskeen, with interactive elements and an emotive audio-visual experience.

Lough Muckno Leisure Park, Castleblayney, Co. Monaghan

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

Keep Discovering Louth

IRELAND'S ANCIENT EAST®

Skipark & Carlingford Adventure Centre
WWW.CARLINGFORDADVENTURE.COM
TEL 042 93 73 100

Test yourself in Carlingford at Ireland's largest Adventure Park. With over 20 aerial, water and land activities for all ages and abilities to try.

Sea Louth Seafood Trail
WWW.SEALOUTH.IE

See, eat and admire the sea Louth Scenic Seafood Trail. This new trail covers over 70km of coast, with stunning scenery and the finest local seafood.

Carlingford Greenway
WWW.VISITLOUTH.IE

Walk or cycle Carlingford's Greenway to Omearh and enjoy stunning views of Carlingford Lough and the Cooley and Mourne Mountains on each side.

Boyne Greenway - Drogheda
WWW.DROGHEDA.IE

Visit the historic walled town of Drogheda and enjoy a 5km walk by the mystical River Boyne to the Battle of the Boyne / Oldbridge House Visitor Centre.

Canoeing on Carlingford Lough, Co. Louth

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

Driving relevancy through digital & social

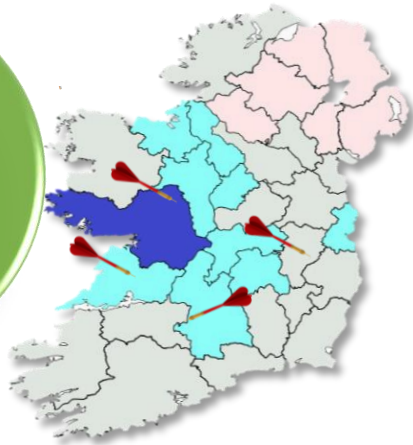


Geo-targeted ads

Within 2-hour radius

Always-on social

YouTube



Showcasing experiences via TV Partnerships...



159K
Reach
per segment



130K
Reach
per segment



1.6M
Total
Partnership
Reach

...and Digital Partnerships

Lovin.ie

Food And Drink Counties Entertainment Sustainability Keep Discovering Music More +



10 terrifyingly terrific events to visit during this year's Púca Festival

DiscoverIreland.ie

22 Weeks
58 items
of content

5.8M
Total social
Reach



View profile



Lullymore Heritage and Discovery Park, Co. Kildare



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.



5 MONTHS AGO

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

ANN CRONIN / 5 SHARES



Carlingford Lough Cruise, Co Louth

Extending an invitation to "Come Alive in the Dark" at Púca Festival

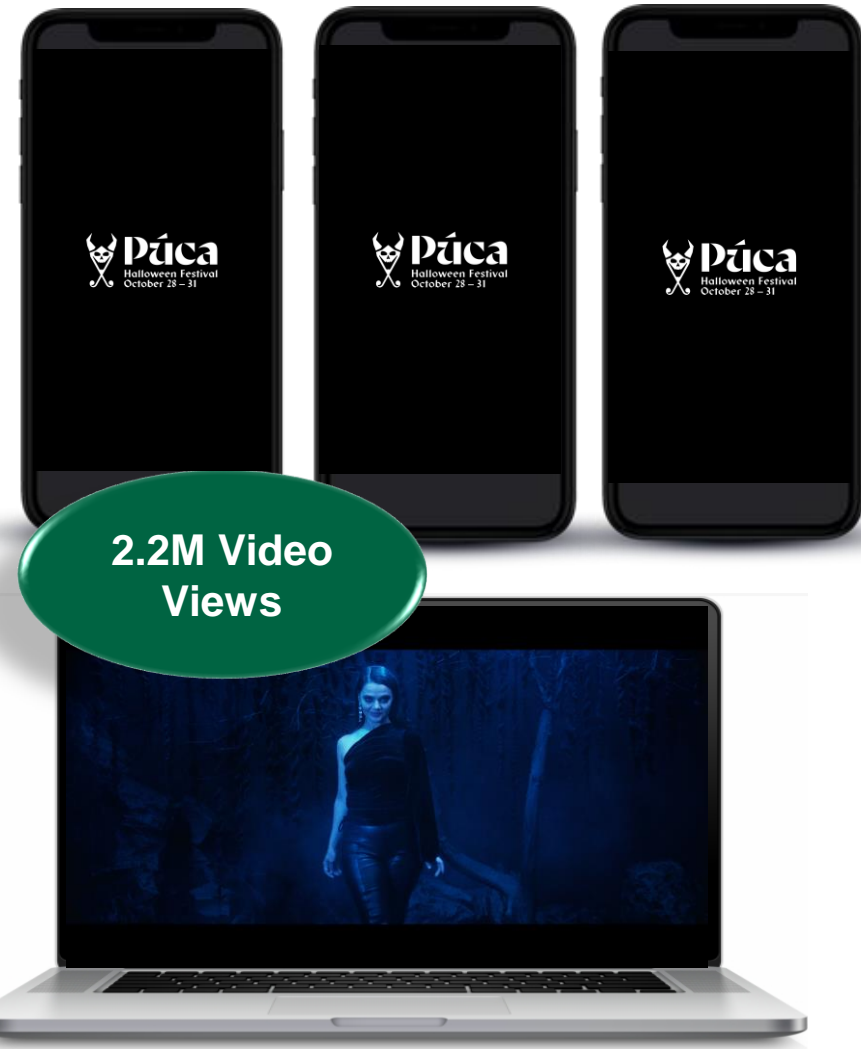


4.3M+
People Reached



Multi-
channel

2.2M Video
Views



Building positive word-of-mouth through PR



Press
Reach
16M +

Co Kildare is a lucky find for every kind of tourist



Glorious greenways, equine heritage and peatlands makes for a charming, explorative getaway

As staycations dominated many of our holiday itineraries throughout the Covid-19 pandemic, it encouraged a lot of us to go looking for 'hidden gems' throughout the island of Ireland, and I recently found one in the shape of Co Kildare.

To be honest, my only knowledge of the county prior to my extended weekend stay there was the fact that it is home to Kildare Village — a luxury designer outlet complex that quite literally looks like a small town in itself — and that it used to host the popular summer music festival Oxegen, at Punchestown Racecourse.

Little did I know Kildare is also home to some of the most beautiful scenery in Ireland. The county also boasts some beautiful hospitality, from the grand Kildare Castle.

We stayed in Leixlip, just north of Naas town and, more importantly, in a lovely pub, full of craic, trad music and a warm atmosphere.

The first activity we did was to go away with rented bikes from Royal Canal Leisure Centre. I was a bit fearful that I wouldn't be cut out for the odd gym spin

Belfast
Telegraph
Reach
60K+

Boyne Valley: A staycation steeped in history and craic

Updated / Wednesday, 16 Nov 2022 06:02



Photo credit: Sarah Gill



By Sarah Gill

Sarah Gill is a Galway-based freelance journalist writing about topics ranging from sustainability and (pop) culture to women's issues and human interest.

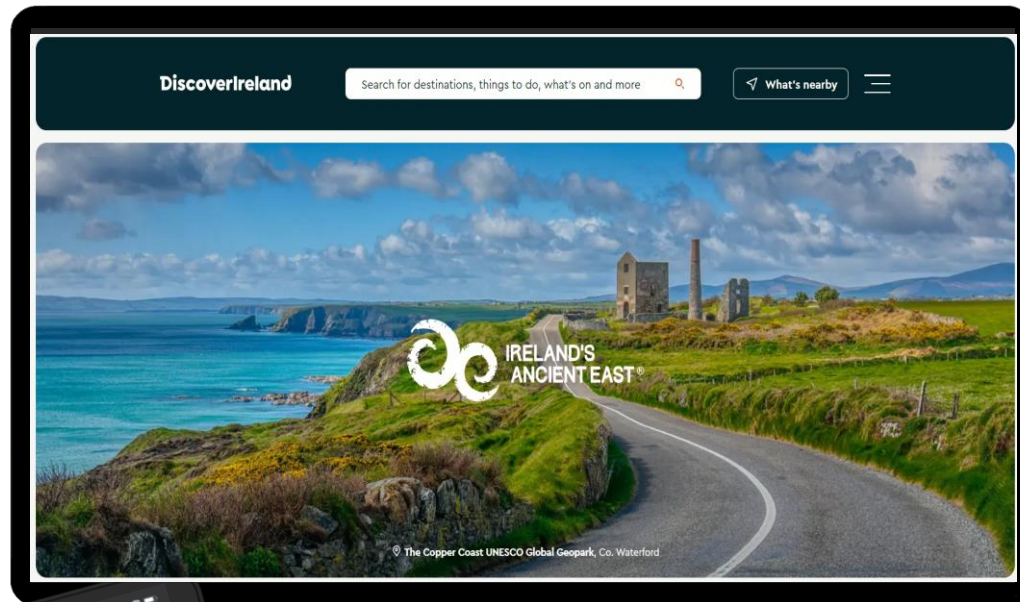
Steeped in historical significance and next-generation know-how, Boyne Valley offered the perfect sisters' staycation. By Sarah Gill.

RTE.ie
Reach
2M

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

Discover
Ireland.ie

 IRELAND'S
ANCIENT EAST®
Wander Through Time



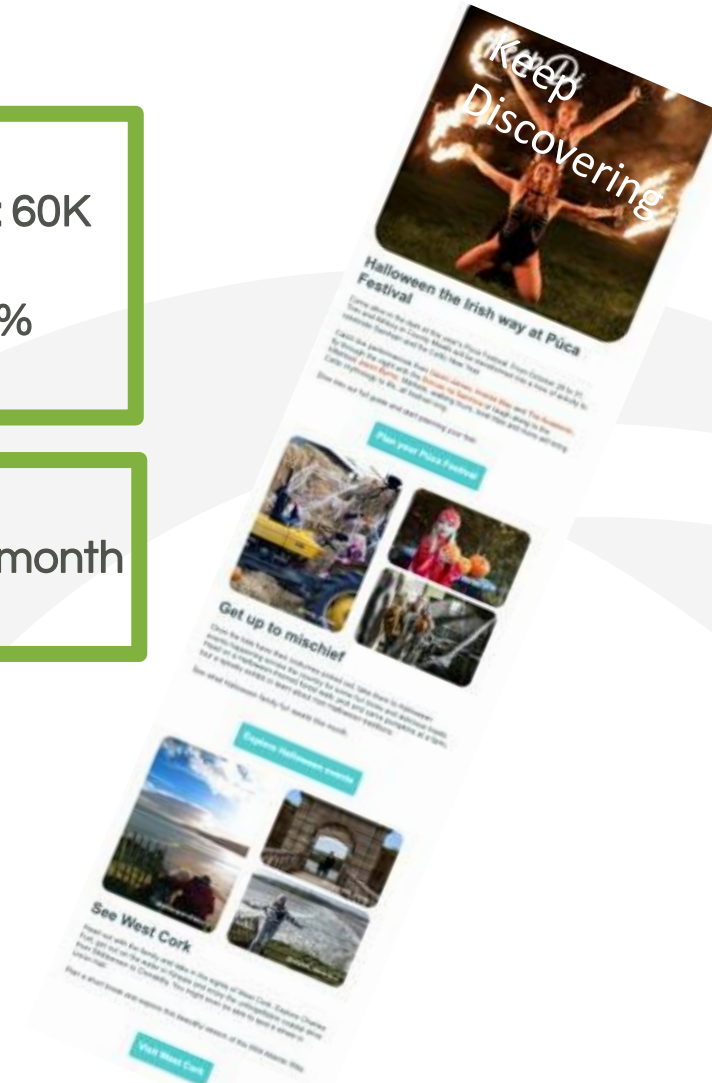
Emails Database: 60K

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

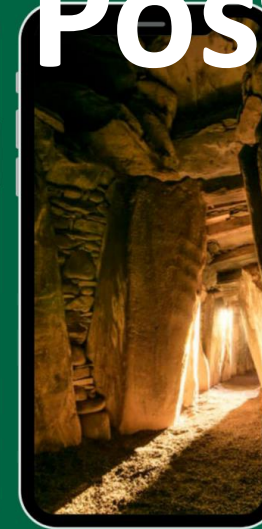
Top Performing Posts



Louth
Views - 8k



Monaghan
Views - 5k



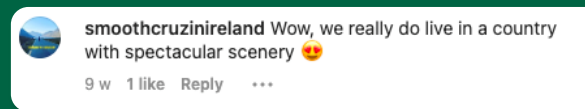
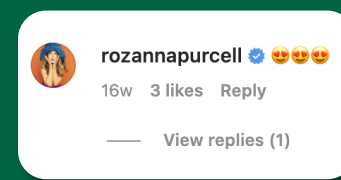
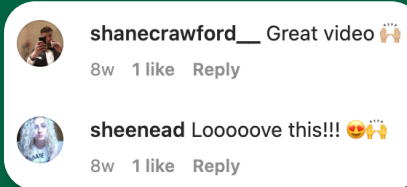
Meath
Views - 10k



Wicklow
Views - 12k



Kildare
Views - 10k



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



An aerial photograph of a golf course. In the center, there is a large, circular green area, possibly a fairway or a large green, surrounded by a dark path. To the left of this central area, there is a large, multi-story building, likely a clubhouse, with a dark roof and several windows. The building is surrounded by trees and other smaller structures. The background shows a vast, rolling landscape of green fields and trees, typical of a rural or golf course setting. The lighting suggests it might be late afternoon or early morning, with long shadows cast across the terrain.

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

Key Takeaway

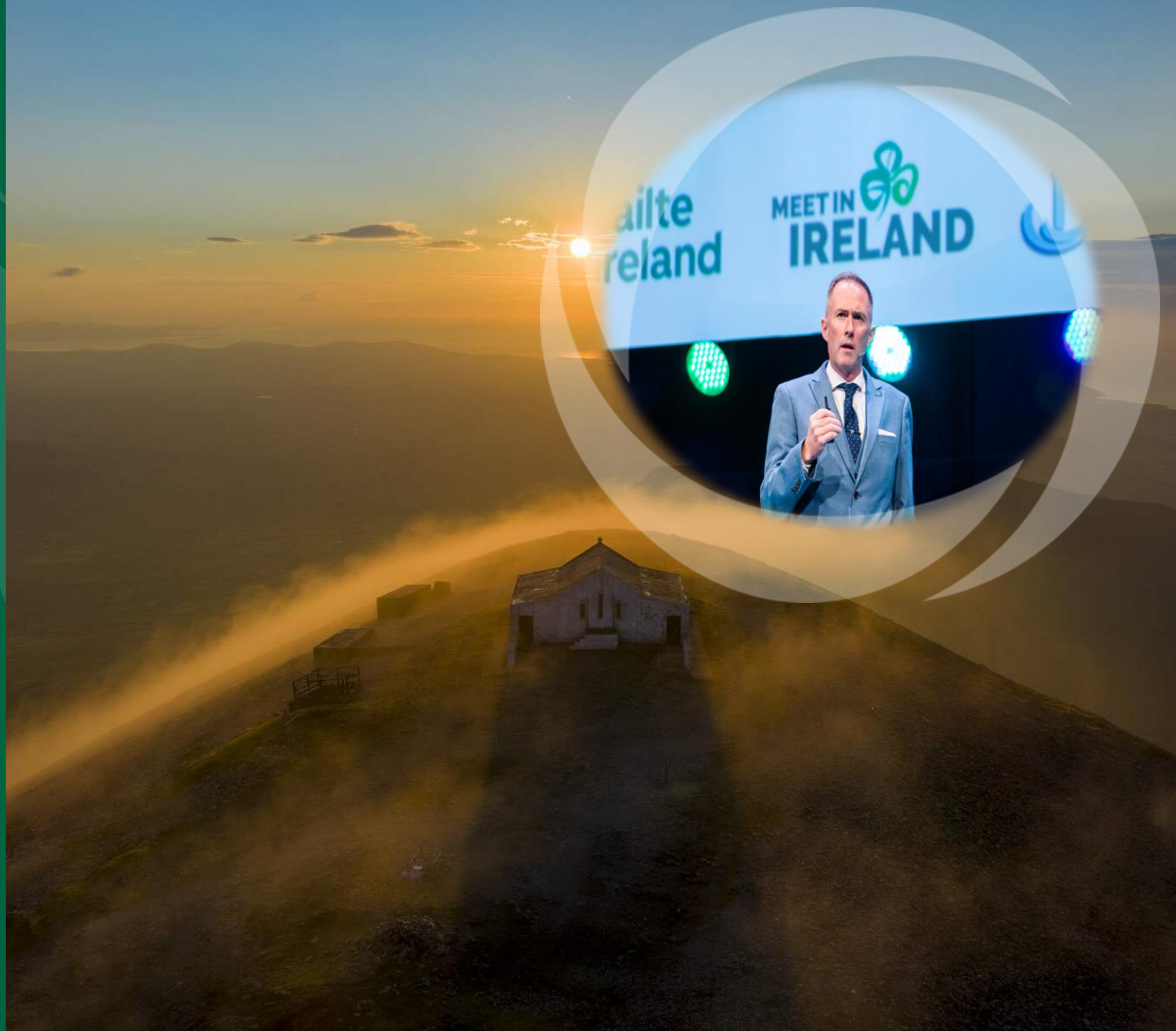


Be Part of

*Keep
Discovering*

DRIVING
SUSTAINABLE
Recovery

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

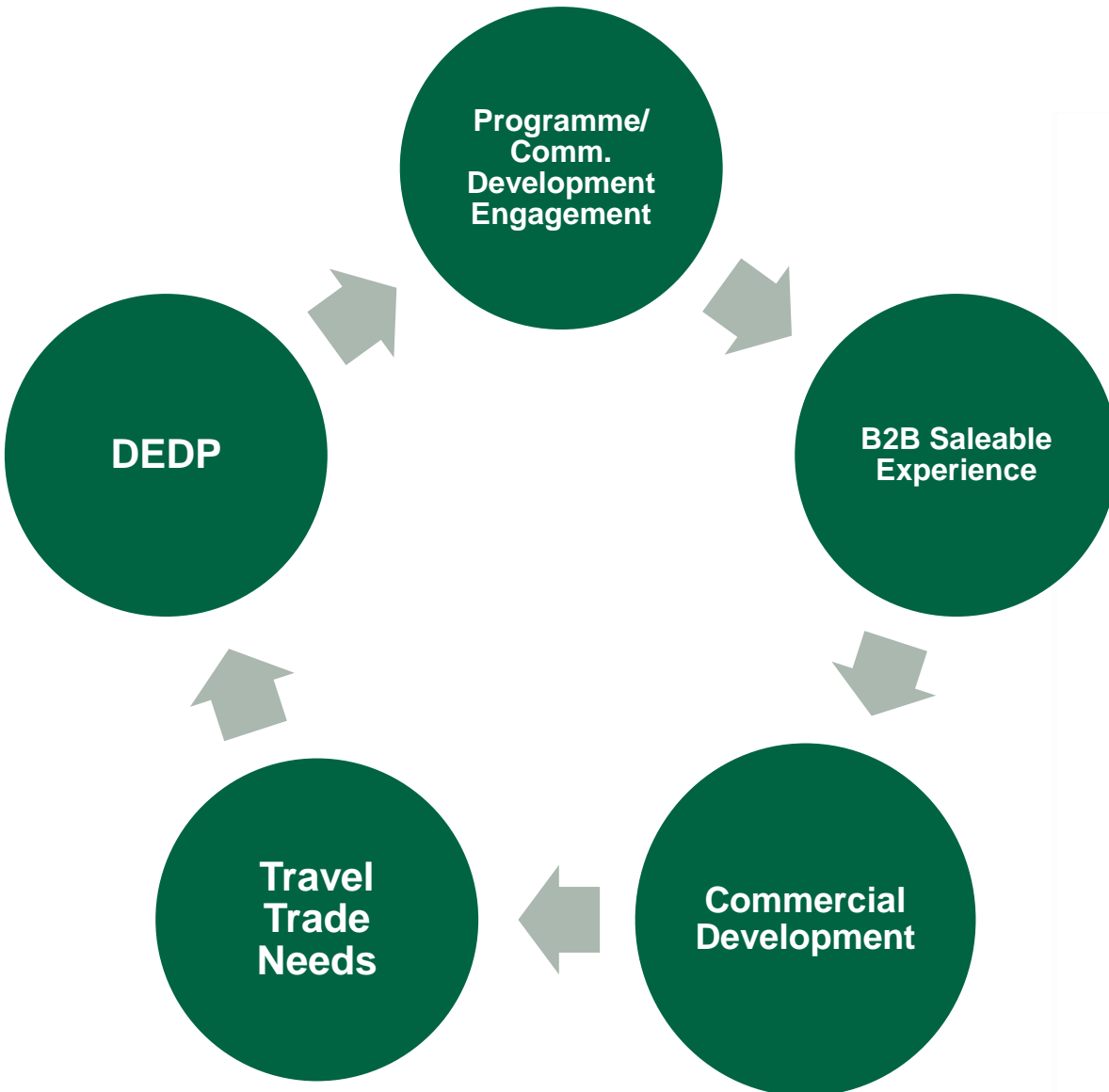


Business Tourism

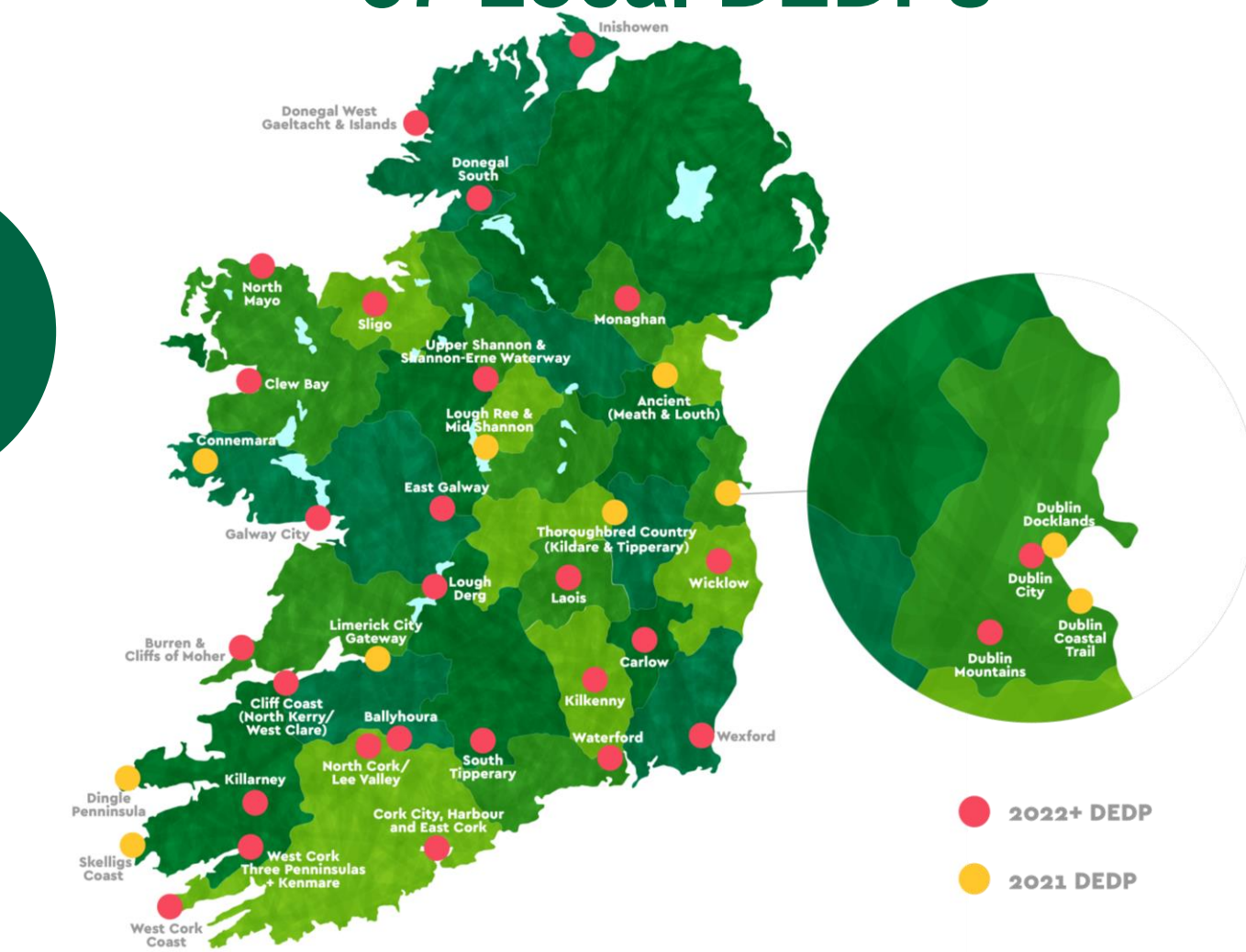
- **€202m** of Events Took Place
- **€271m** of Leads Generated
- **€183m** of Leads Converted
- **€660m** of Leads Added to Pipeline



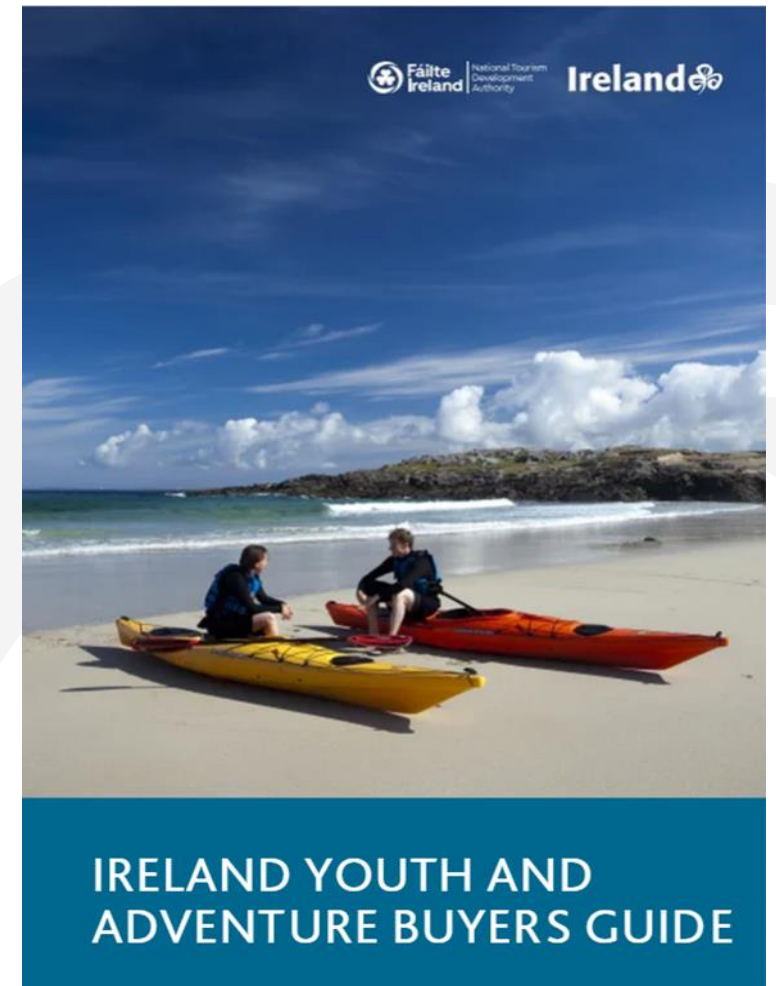
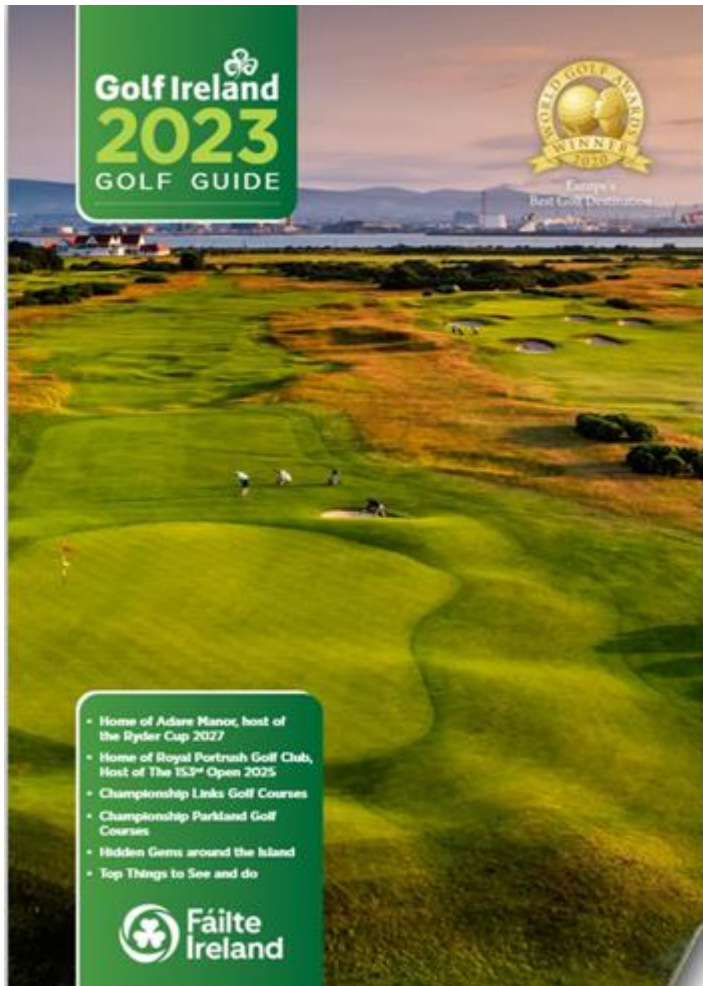
B2B Saleable Experiences



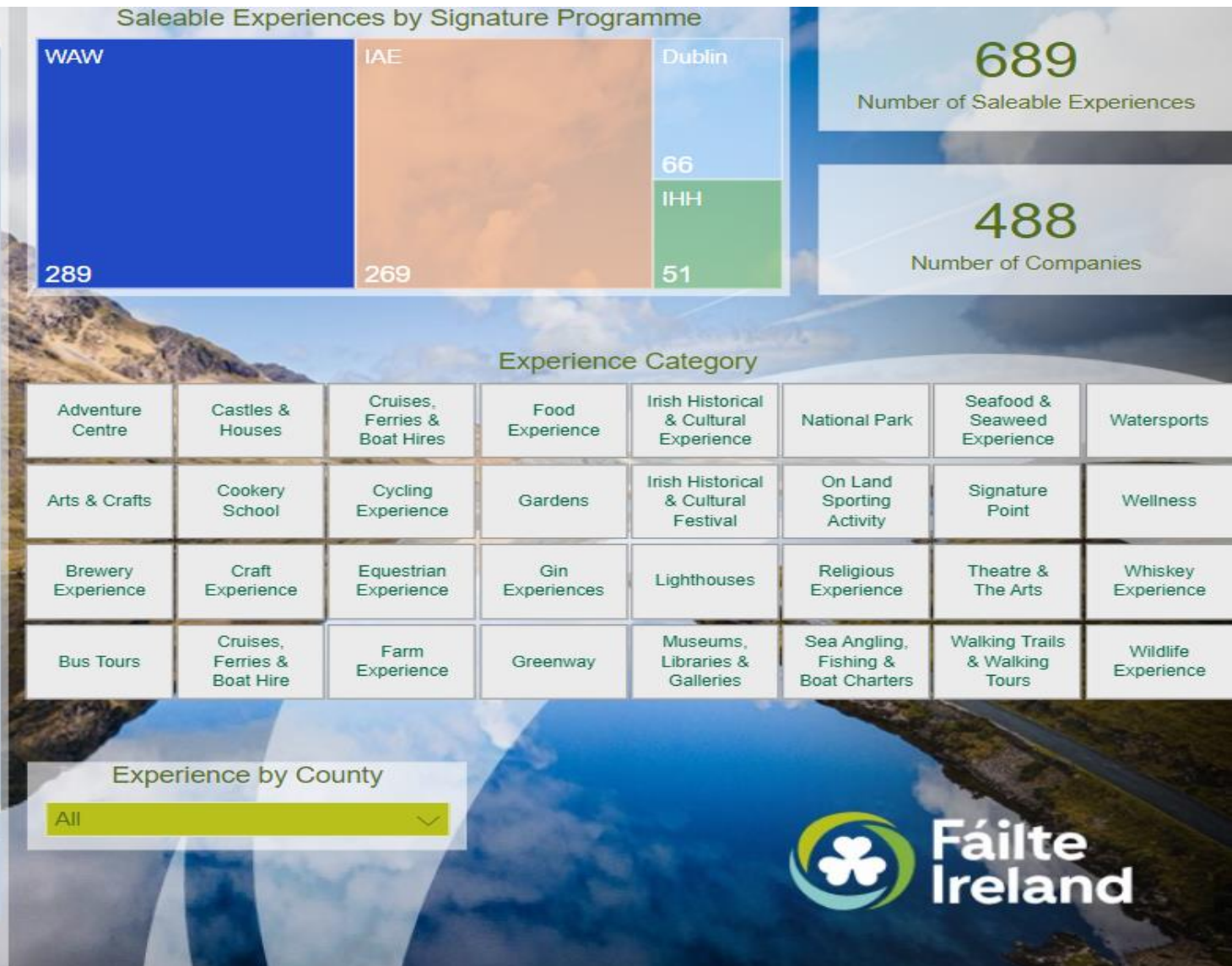
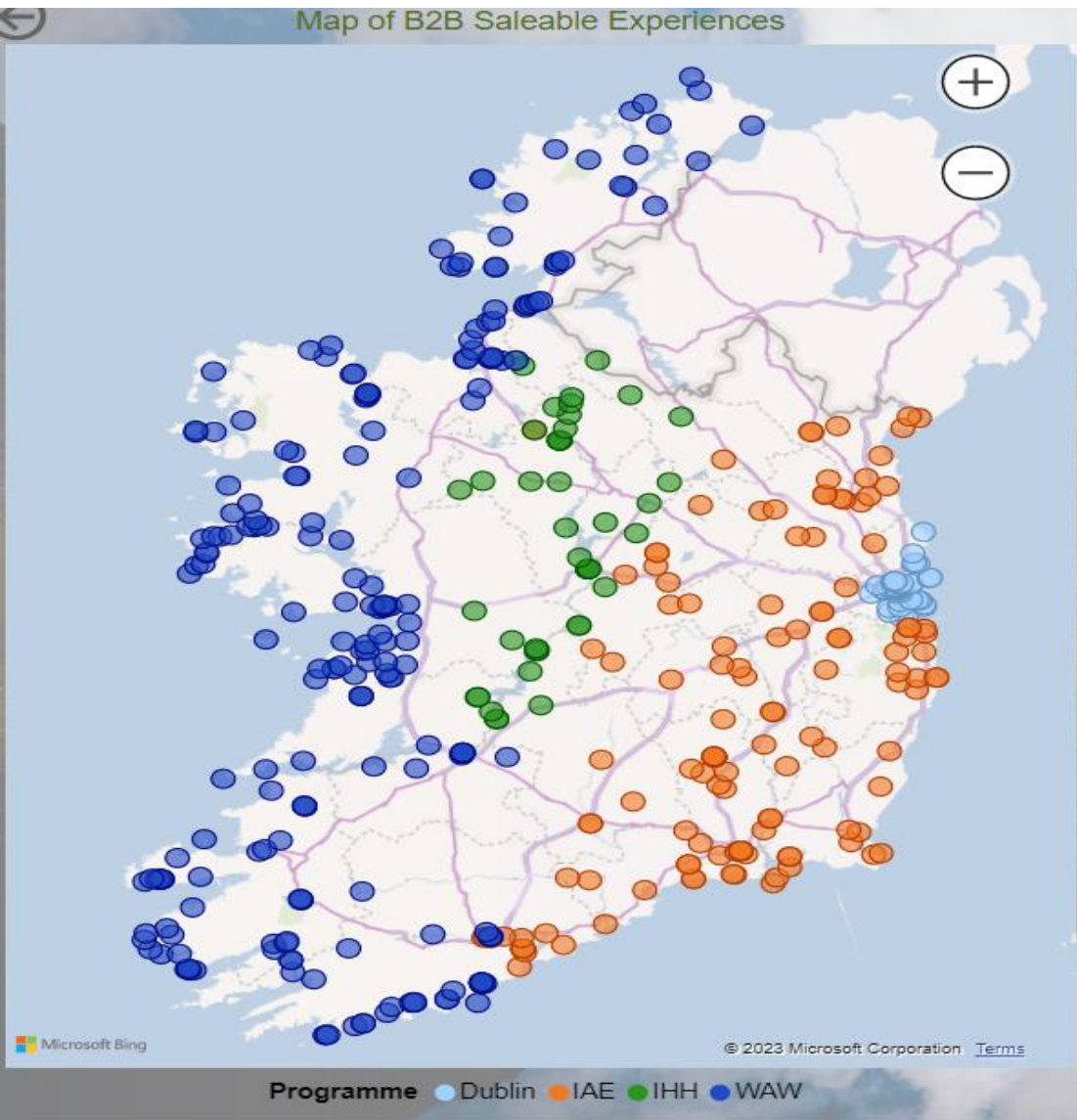
37 Local DEDPs



Buyer Guides and Presentations



Buyer Portal



Platforms and Fam Trips



266
Buyers



490
Industry



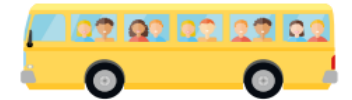
15
Markets



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

DRIVING
SUSTAINABLE
Recovery



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

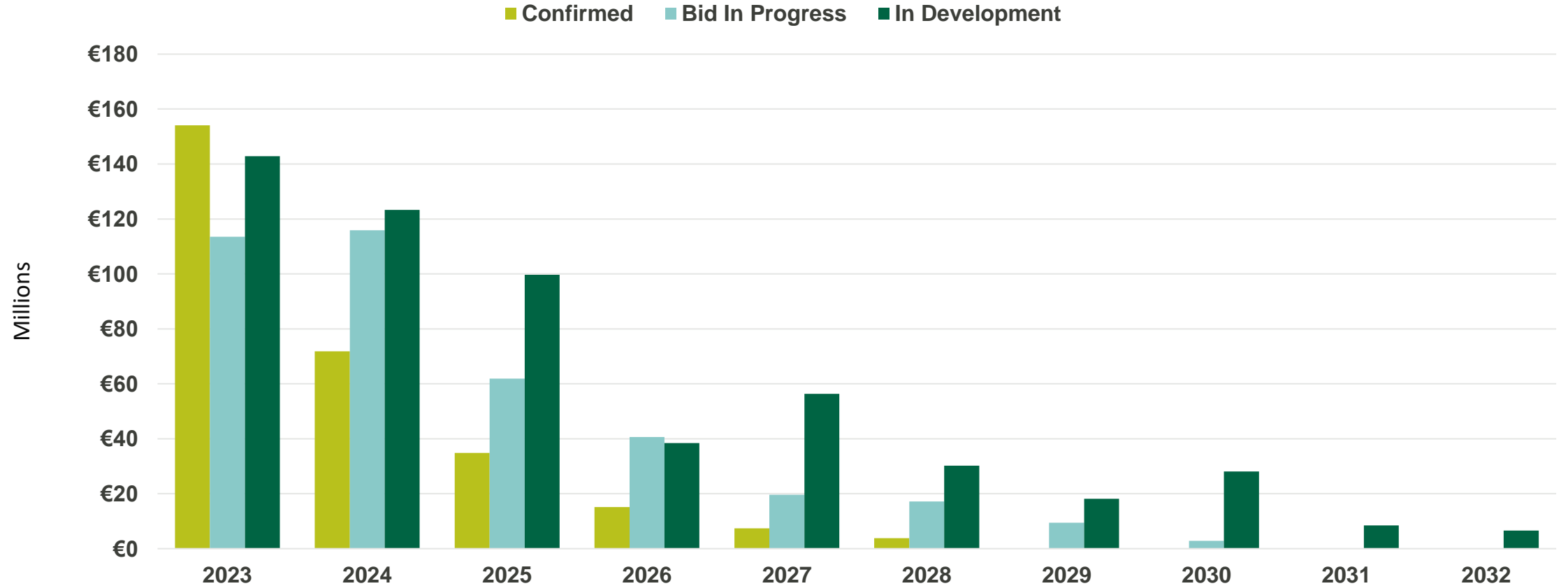
117
Master
Connections

4
Fams
30+ buyers

20
Overseas
sales
platforms

1
Luxury
Destination
Showcase
40 buyers

Business Events Pipeline 2023 - 2032



€1.22bn
Events Value

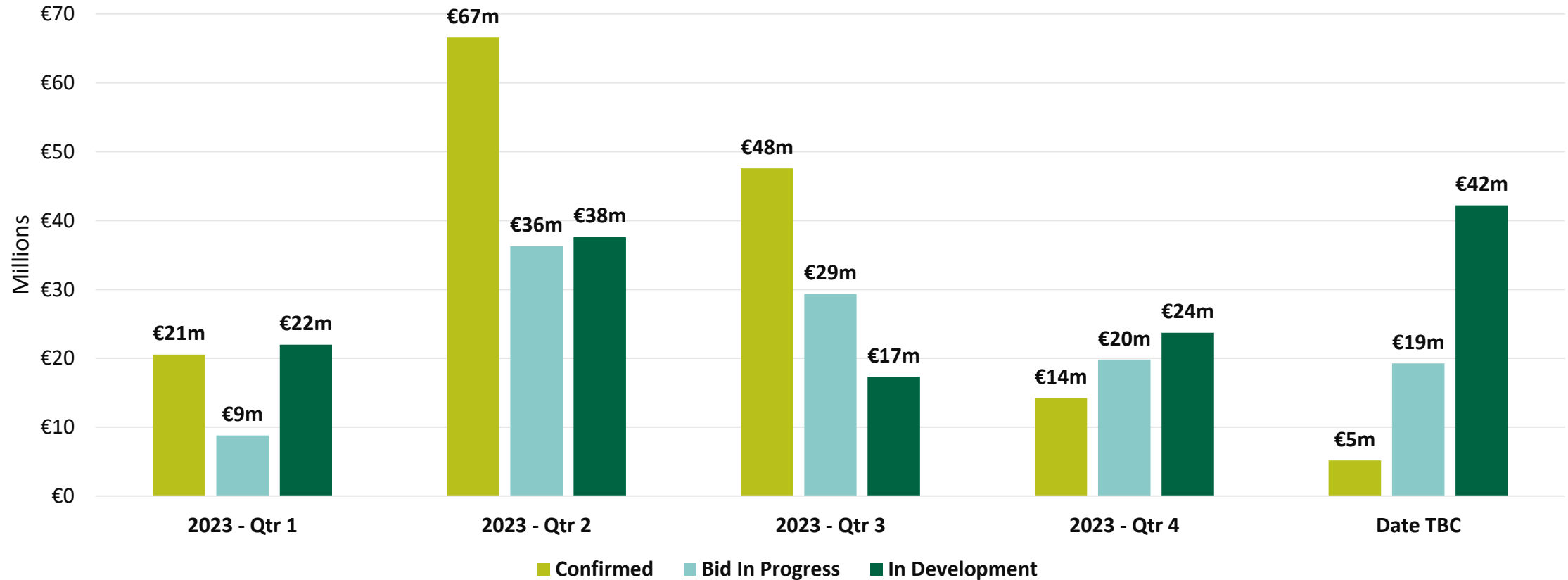
€287m
Confirmed (24%)

€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



Business Events 2023 Platforms



- **3 Headline Events**
- **80 BCD M&E Leadership Conference**
- **30 HPN Presidents Club**

- **4 Fams with 40 Buyers**
- **DMC & Industry FAMs**
- **Meet Dublin in London**

2023 Priority Projects



Gala Dinner Venues Scheme



Legacy & Impact



Ambassador Club



Sustainability



Meetings for All

Dublin Convention Bureau



€900m + confirmed business

589,774 international delegates

- Working with industry to generate and convert opportunities
 - Dublin specific sales generation activities
 - Membership structure

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

Who benefits?



1

Consumers



2

Industry



3

Destinations



4

Ireland

Thank you

Ní neart go cur
le chéile

