



# Donegal, Sligo & Leitrim Regional Industry Briefing

Radisson Hotel, Sligo

21<sup>st</sup> Feb, 2023 10.30am

# Agenda

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National & Local Context

Paul Keeley & Miriam Kennedy

Product & Enterprise Development

Fiona Monaghan & Joan Crawford

Panel Discussion

Marketing & Commercial Development

Deirdre O'Brien & Martin Donnelly

Q&A





Fáilte  
Ireland

DRIVING  
SUSTAINABLE

*Recovery*

# Topics

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1. National Highlights – 2022
2. 2023 Outlook & Supply side challenges to overcome
3. Regional Outcomes & Perspectives – 2022 and 2023



## Section 1:

# 2022 Review

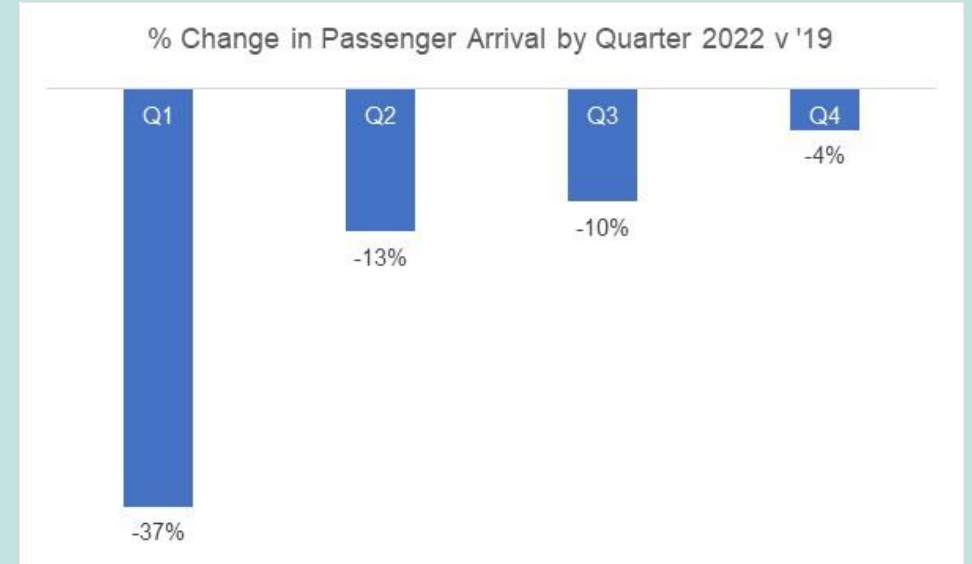
- Overseas
- Domestic



# 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



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**

## 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
Great Britain	+2%
Mainland Europe	+4%
North America	-2%
Rest of World	+8%
All Markets	+3%

# 1. Demand Side Opportunities

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## 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



# Supply Side Challenges

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

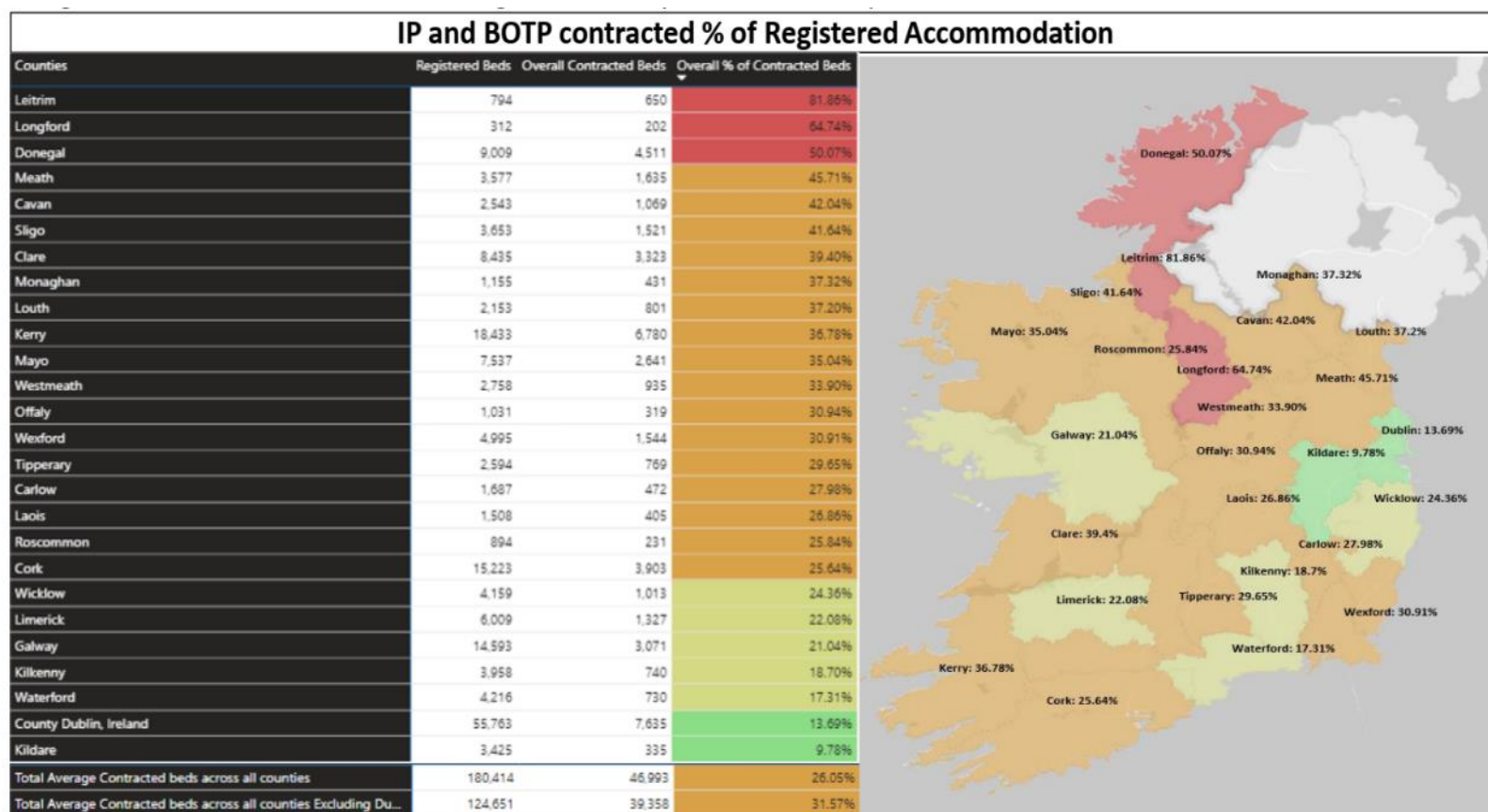


1. Pressure on margins
2. Price pressure/lost business
3. Pressure to maintain standards
4. Regional mobility impacted
5. Long-term reputational risk

# Government Contracts



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



- The Graphic here details the percentage of IP and BOTP contacted 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



Fáilte  
Ireland



WILD ATLANTIC WAY  
SLÍ AN ATLANTAIGH FHIÁIN



# Sustainability Targets

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- 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





# VICE Framework

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

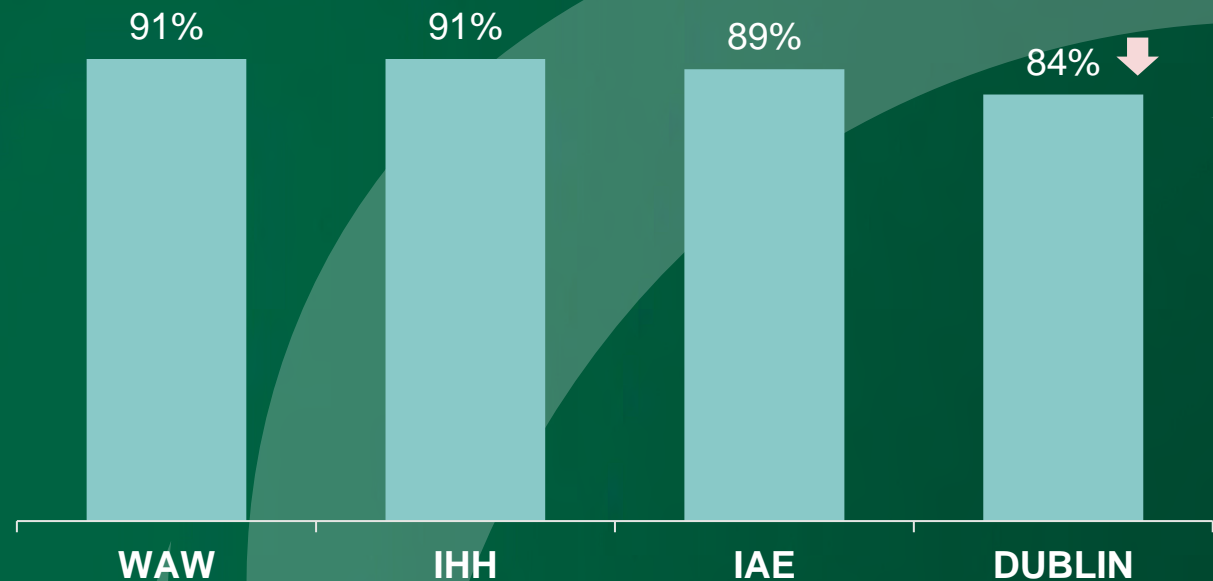
VISITOR

# 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.

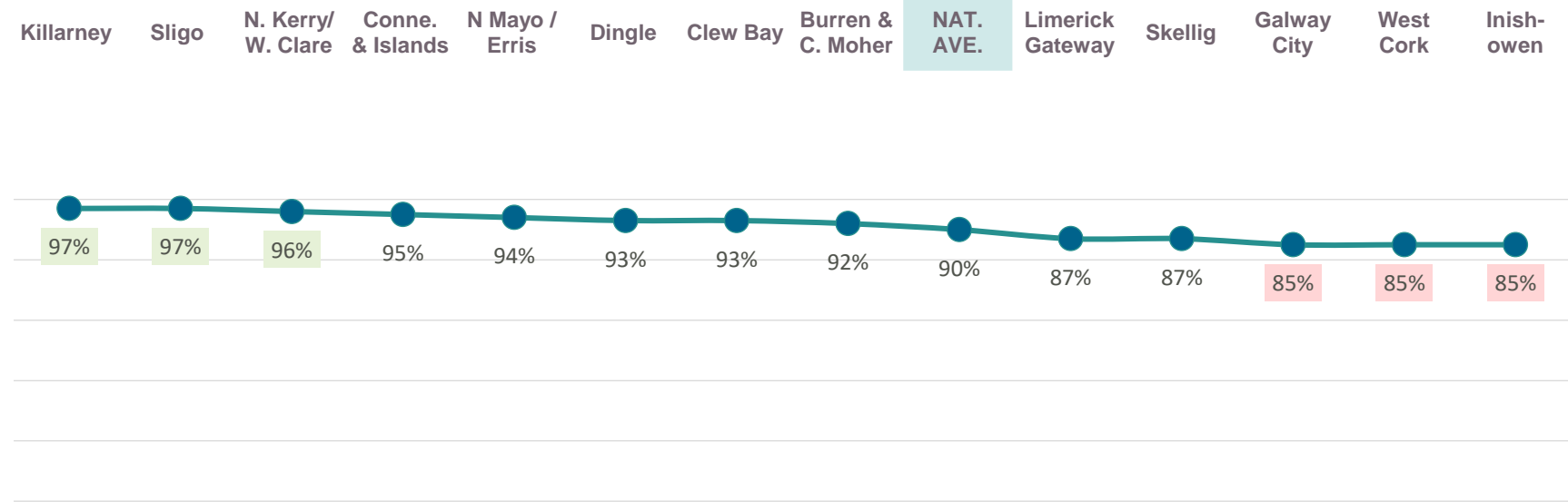
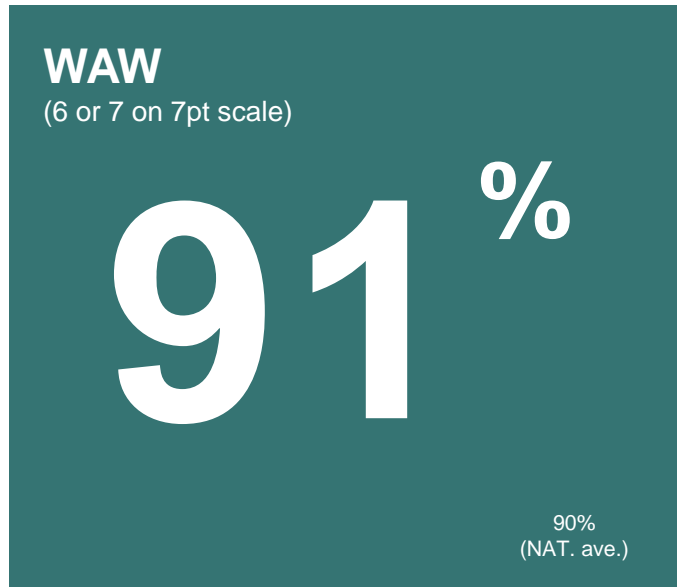




# The majority of WAW DEDPs deliver high quality experiences. Galway, West Cork and Inishowen require improvement in look and feel elements, as well as food and activity offerings.



## TRIP SATISFACTION - "VERY SATISFIED"



■ Significantly higher than National ave. (99% CI)  
■ Significantly lower than National ave. (99% CI)

Base: 2461  
Q.17 To date, how satisfied are you with your trip to this area?





**WILD ATLANTIC WAY**

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- Wild Atlantic Way is the template for retaining visitor movement within its brand area and is also the most ‘connected’ brand – with the highest incidence of awareness and visitation to nearby attractions.
- While trip satisfaction is consistently high, there is wide variation in the VFM ratings across DEDPs, with Galway city a clear concern.
- WAW leads the national ratings on ‘look & feel’ and excels on outdoor activities and sightseeing. The evaluation of food offering and ease of travel does however vary significantly across the brand’s DEDPs.



INDUSTRY

# Industry Sentiment





# Good Optimism within Wild Atlantic Way

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**66%**

Stated 2022 volume of business was ahead of 2021

**58%**

Stated 2022 volumes were up or at least equal to 2019

**78%**

2023 volume will surpass or match 2022

**85%**

Costs are key 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%
Donegal	64	69	-5 ppts	131	94	39%	84	65	29%
Sligo*	69	72	-3 ppts	118	85	38%	81	61	32%

*\*Small sample size*



COMMUNITY

# Tourism Approval Rating



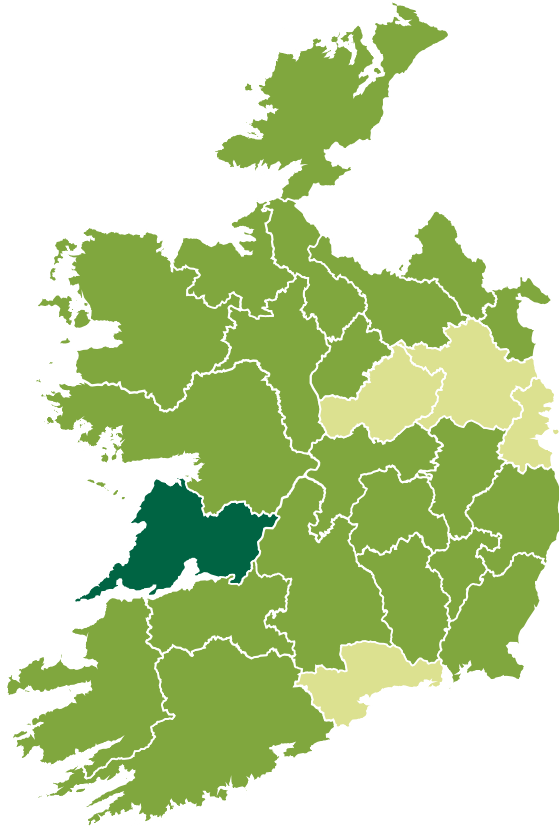
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Ireland



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# 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

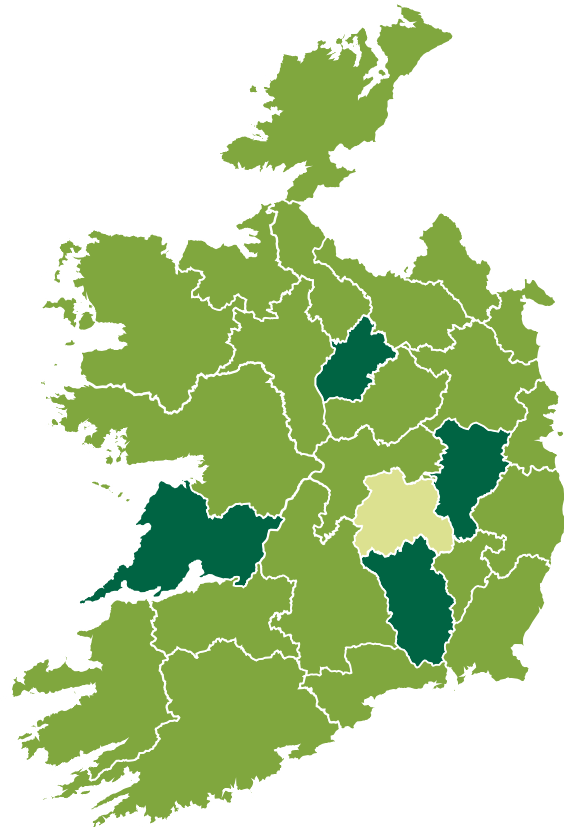
County	TAR Score
Clare	80
Kildare	77
Longford	75
Kilkenny	74
Donegal	72
Monaghan	72
Tipperary	72
Leitrim	72
Limerick	70
Cavan	70
Sligo	68
Mayo	68
Offaly	68
Wicklow	68
Cork	67

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	

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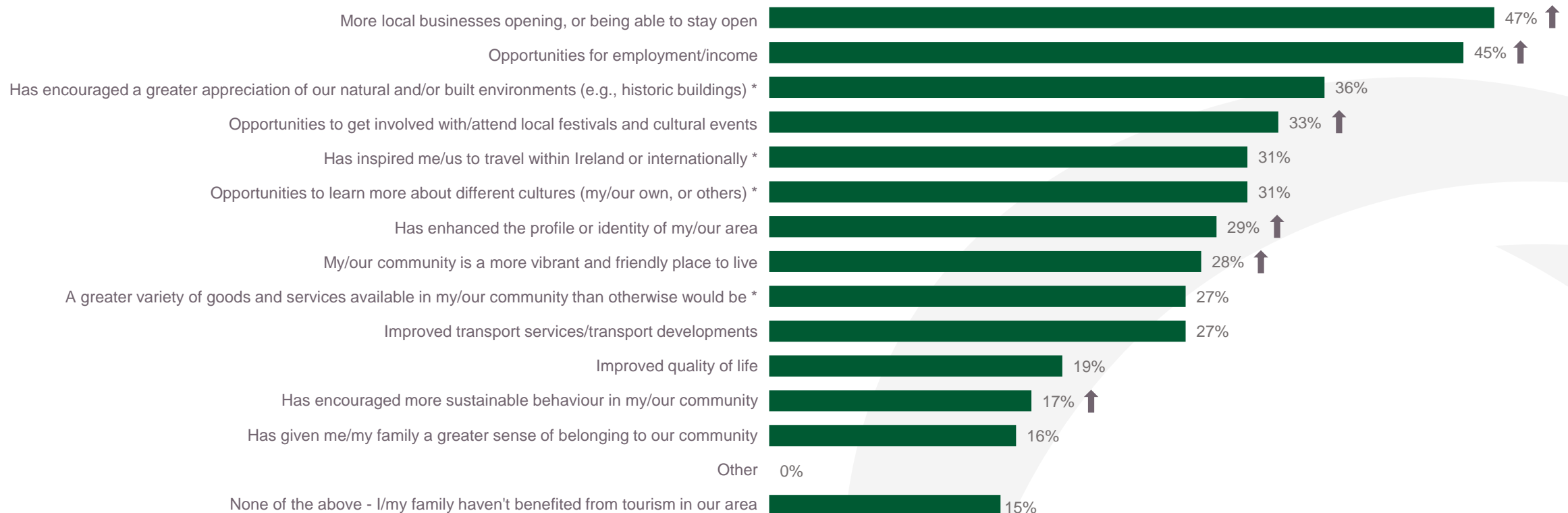
(Base: Apr 2022 - Sep 2022 – Irish residents n=1,771)

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%

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

ENVIRONMENT

# Environmental Sustainability



# Environmental Sustainability

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- 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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Ireland



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# 7 Areas of Transformational Change

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Sustainable Business Recovery



Supporting Tourism Careers



Accelerate Domestic Tourism



Opening the Outdoors



Industry Digitalisation



Destination Development and Distribution



Driving Climate Action





# Wild Atlantic Way Regional Tourism Development Strategy

Miriam Kennedy



# What you had to say ...

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“Appropriate and sustainable facilities and infrastructure are needed to “open up” the outdoors”

“The importance of protecting the “wildness” of the west coast”

“The volume and value of tourism to the Wild Atlantic Way is uneven leading to cold spots and hot spots

# Our Strategic Challenges

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Grow year round appeal of WAW

Raise intl. profile of northern half of WAW & increase revenue

Increase revenue, dispersion & season extension across southern half

Enable & assist industry growth

Protect cultural authenticity & 'wildness'

Create flourishing destinations & thriving communities.



1

## Grow year round appeal of WAW, Attract & disperse high value visitor.

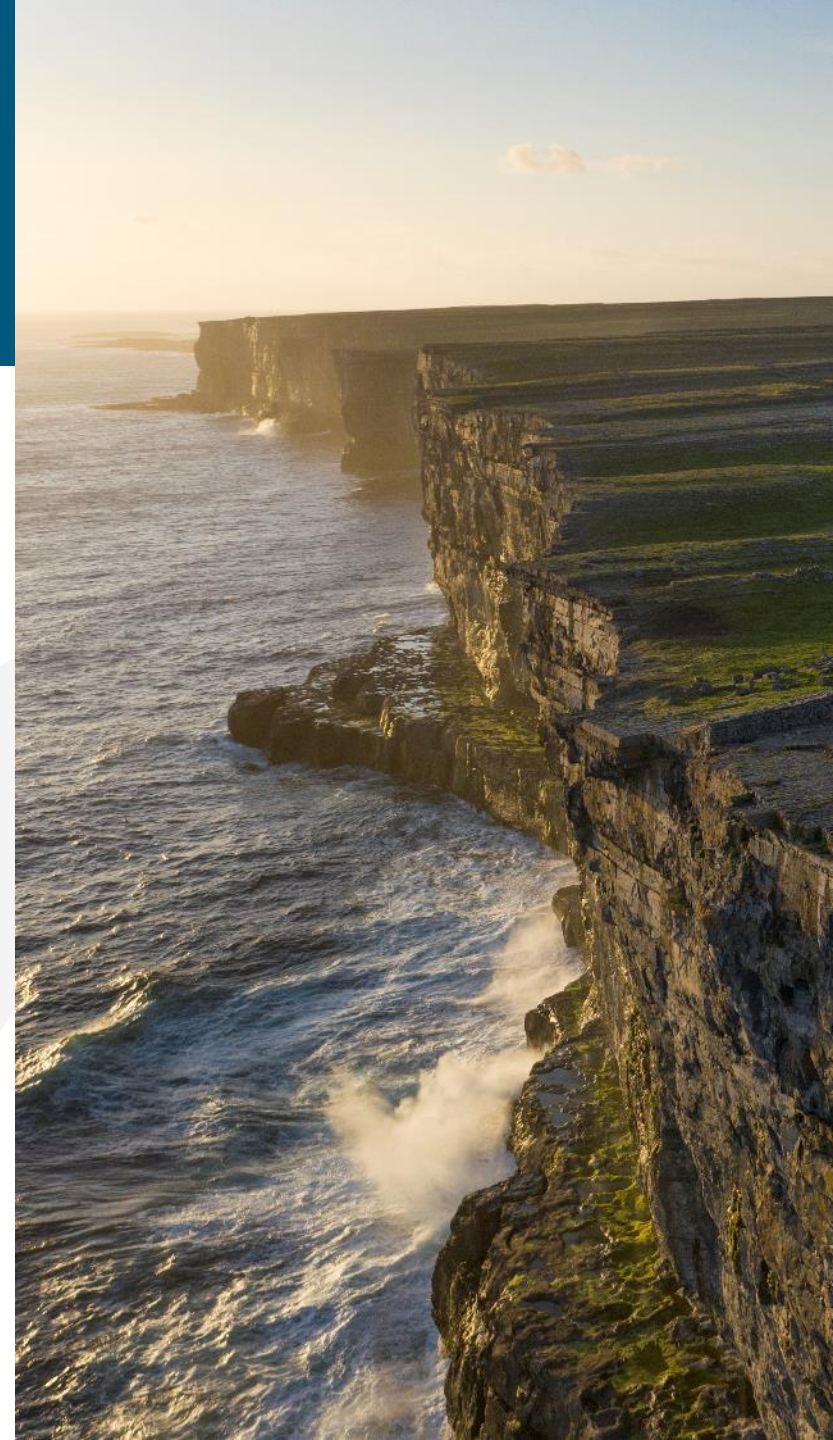
- Create a more differentiated approach to marketing the WAW
- Improve the online presence & bookability
- Invest in the route to ensure a consistent and quality experience.
- Improve public transport





## Raise the international profile of the Northern half of the Wild Atlantic Way to increase visitation and revenue.

- Address need for iconic attractors in the northern half.
- Drive incremental tourism revenue through sustained promotion domestically and internationally.
- Create a more sustained partnership and focus with TNI and TI to better partner on Wild Atlantic Way and Causeway Coast.







### 3

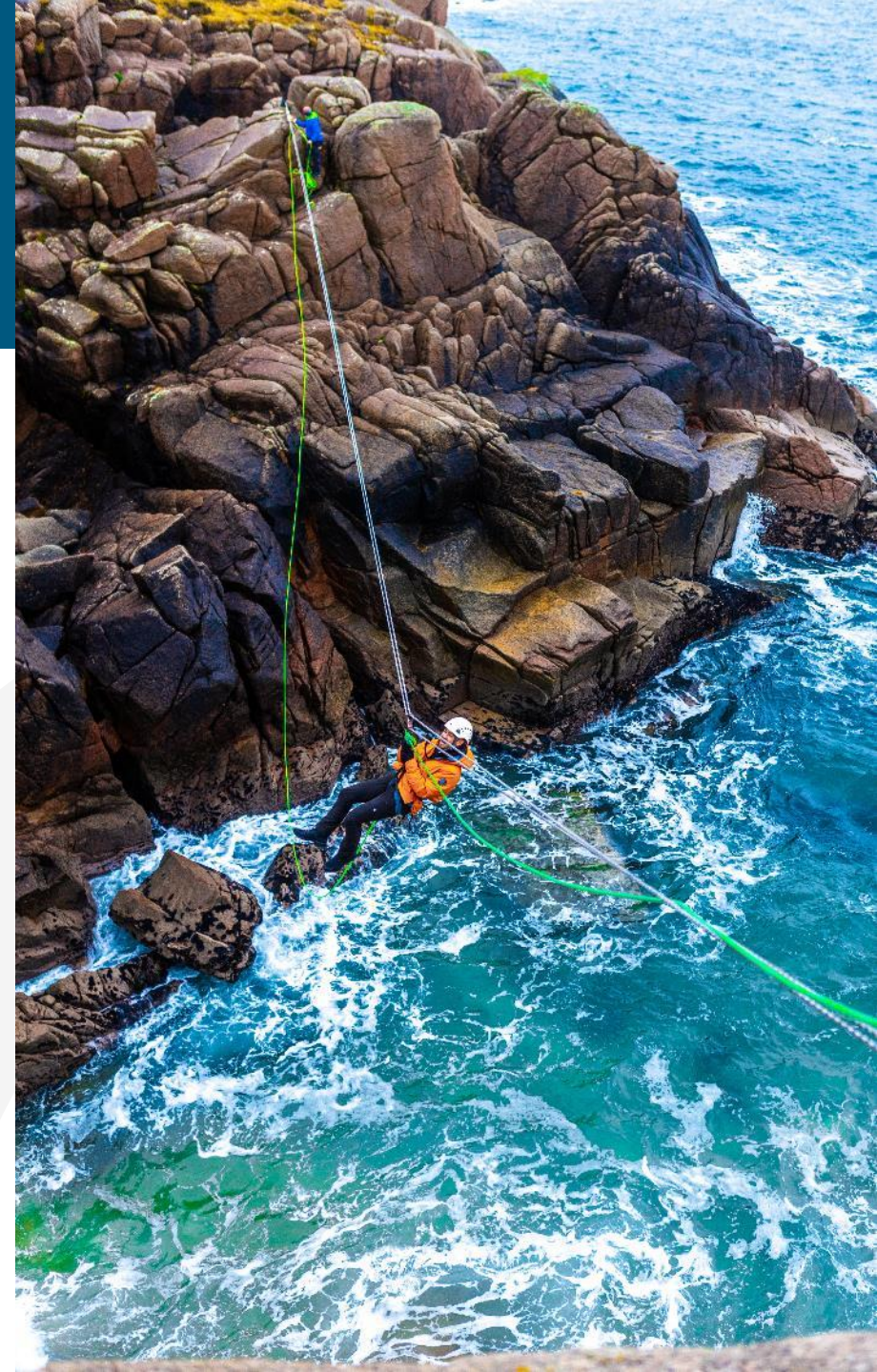
## Increase tourism revenue, visitor dispersion and season extension across the Southern half of the Wild Atlantic Way

- Develop new, refreshed offerings in established destinations to maintain competitiveness.
- Address the need for strong supporting all weather attractions to retain the visitor and extend the season
- Enhance and improve the visitor experience at a range of existing signature and iconic visitor attractions
- Provide strong visitor management plans



## Protect the cultural authenticity and “wildness” of the Wild Atlantic Way

- Provide more appropriate visitor facilities
- Build and substantiate the reputation of the region as a sustainable tourism destination.
- Protect and share cultural authenticity of west
- Ensure that “wildness” remains at the core of the Wild Atlantic Way







5

## Enable and assist the industry to grow

- Provide appropriate supports and interventions to enable businesses to thrive

6

## Create flourishing destinations and thriving communities.

- Implement DEDPs
- Build strong tourism networks
- Involve local communities in decisions

# DEDP Development





# DEDPs on the Wild Atlantic Way

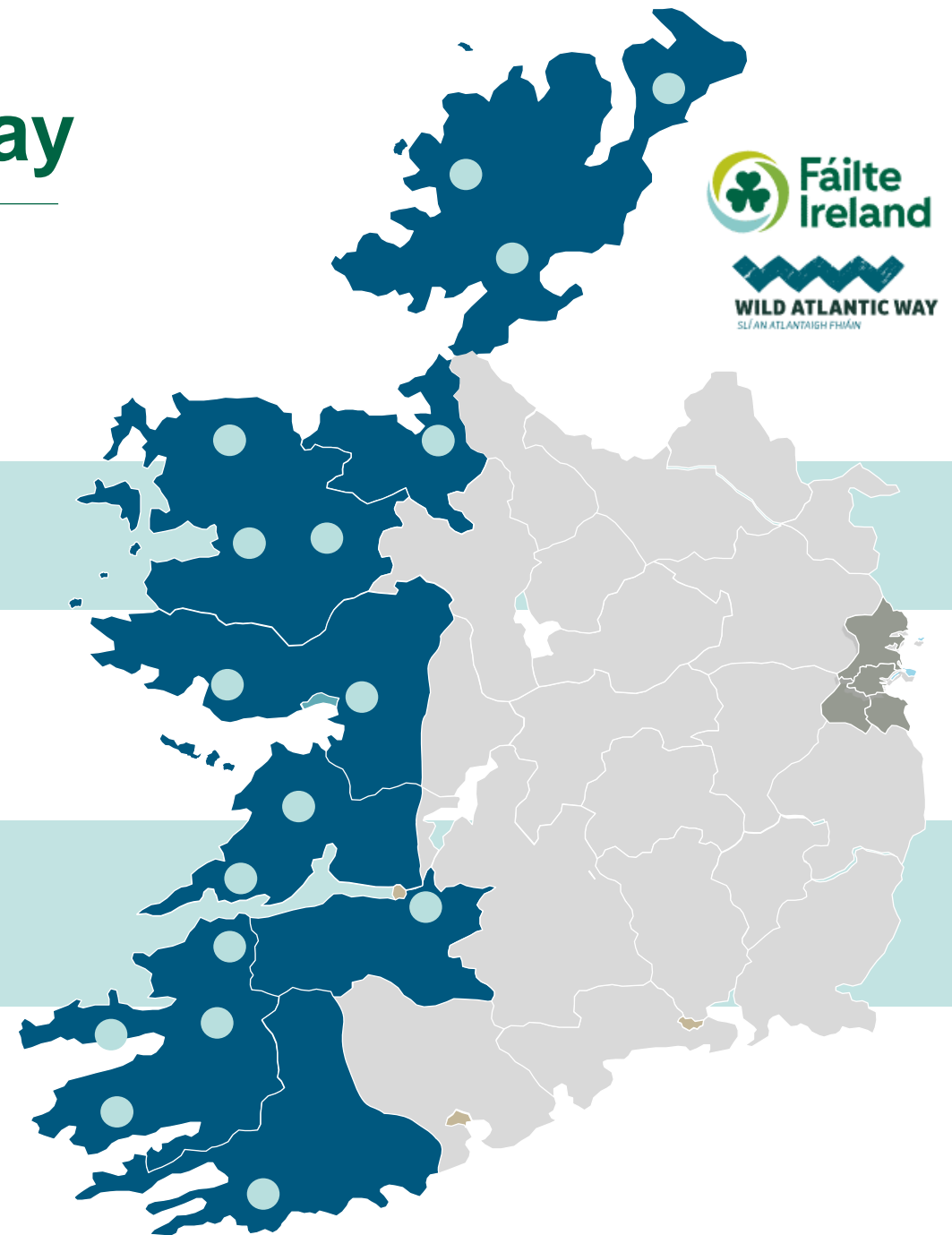
## 16 DEDPs

Launched or in development across the Wild Atlantic Way

## 600+

Industry and stakeholder champions engaged with across the WAW

1. Inishowen Peninsula
2. West Donegal & Islands
3. South Donegal
4. Sligo
5. North Mayo/Erris
6. Clew Bay
7. East Mayo
8. Connemara & Islands
9. Galway City
10. Burren and Cliffs of Moher
11. Limerick
12. Cliff Coast (North Kerry/West Clare)
13. Dingle Peninsula
14. Skellig Coast
15. Killarney
16. West Cork, Three Peninsulas & Kenmare





# Inishowen





# Why the plan was needed ...

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1

Very uneven distribution of visitors across the destination and highly seasonal/low length of stay

2

There is an apparent Lack of indoor product that is motivational for visitors and in turn there is a clear gap supporting the evening economy

3

Relatively high proportion of day trippers – need to generate more overnights.



# Catalyst Projects





# Co. Sligo DEDP









# Why the plan was needed ...

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No standout reason  
to visit or overnight  
in Sligo



Low level of  
international visitors



Fragmented  
approach to tourism

# Catalyst Projects



*National Surf Centre*



*Hazelwood House*



*Coolaney Mountain Bike Trail*



*Queen Maeve's Square*

Architect's Impression of Clapham Group Culture



*Shared Water Sports Facilities*



*Outdoor Dining*



# West Donegal & the Islands





# Plan to launch in 2024





# Shared Islands Fund



Fáilte  
Ireland



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# Shared Islands Fund



# €7.6m

The vision is to connect the Causeway Coast and the Wild Atlantic Way in such a way that the visitor is motivated to stay longer and spend more thereby bringing greater economic benefit to the region

## Cross – Border Collaboration

The partners for this project will be Tourism Northern Ireland, Fáilte Ireland & Tourism Ireland

# 2023 - 2025

## Discovery Point Development

## Common digital strategy

## Cross border online booking experience



# Product Development Investment Pipeline



# National Surf Centre, Strandhill



Fáilte Ireland Funding:  
**€1,363,639**

Total Project Costs: **€2,838,287**

Expected Opening Date:  
**Summer 2023**



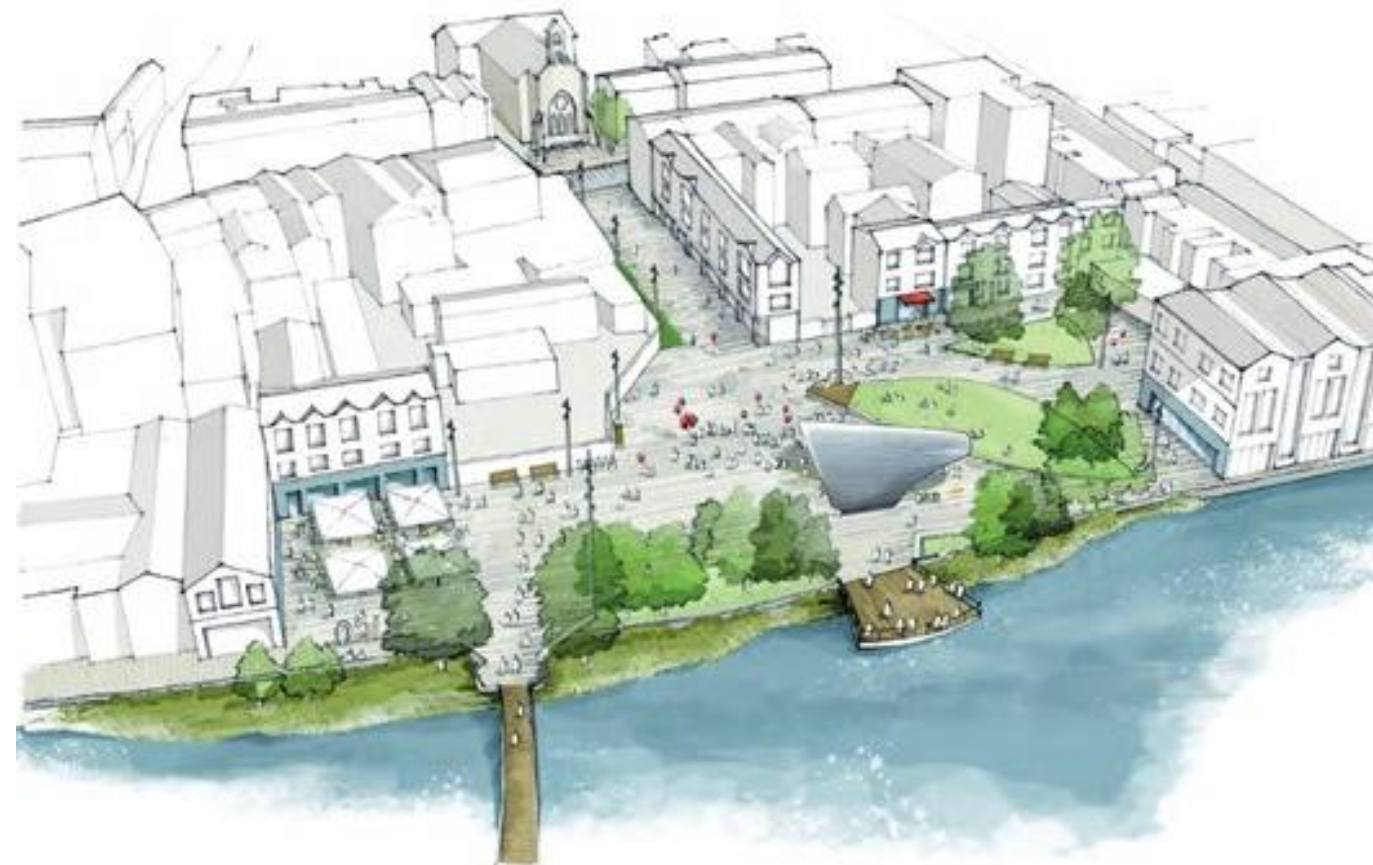


# National Surf Centre, Strandhill

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# Queen Maeve Square & Garavogue River Walk



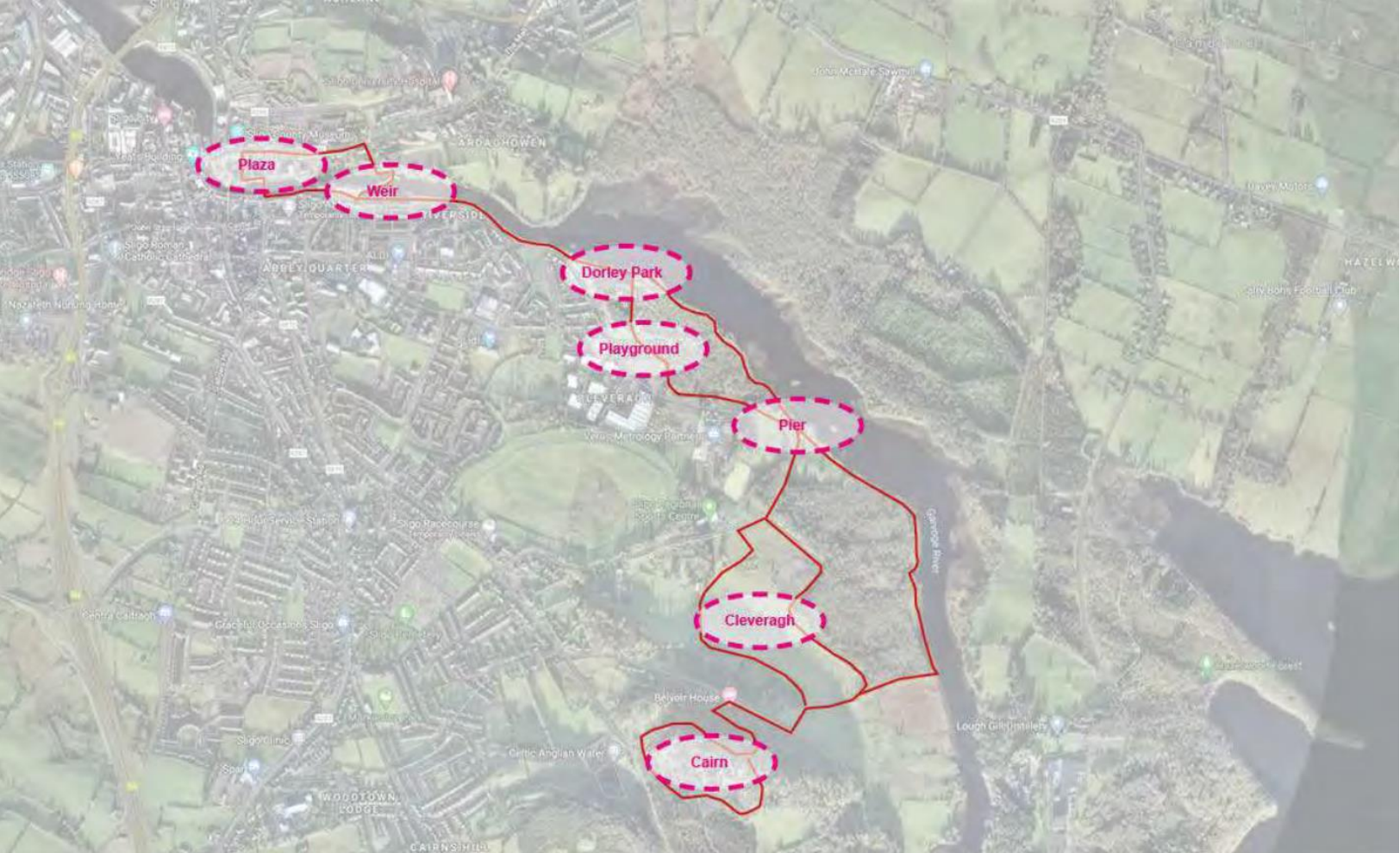
Fáilte Ireland Funding:  
**€2,583,256**

Total Project Costs: **€3,605,342**

Expected Opening Date: **2023**



# Queen Maeve Square & Garavogue River Walk



# Platforms for Growth 1 - Fort Dunree



Fáilte Ireland Funding:  
**€9,251,000**

Total Project Costs: **€12,400,000**

Expected Opening Date:  
**2025/2026**



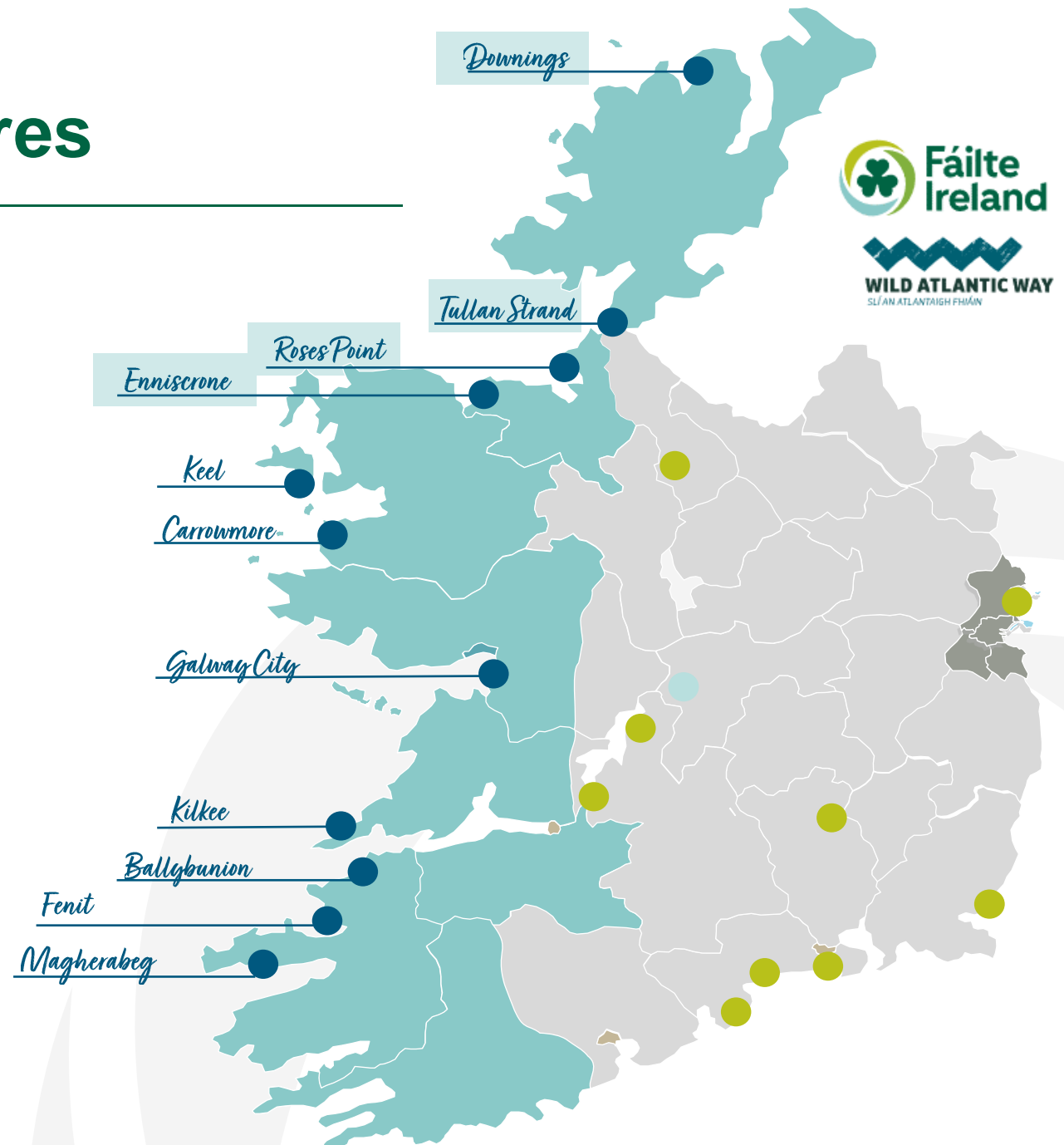


# Water Sports Facility Centres



Donegal & Mayo

Fáilte Ireland Funding: € 3,4000,000  
Expected Opening Date: 2024 / 2025



# Mountain Bike Trail Centre - Coolaney



Joint RRDF Project with Coillte

Total Project Costs:  
**€13.68 million**

Expected Opening Date:  
**2024 - 2025**





# Carrowmore Megalithic Cemetery



OPW



**Co. Sligo**

Fáilte Ireland Funding: **€262,500**

Total Project Costs: **€350,000**

Expected Opening Date: **2024**



# Glenveagh National Park New Branding & Website



An tSeirbhís Páirceanna Náisiúnta  
agus Fiadhúlra  
National Parks and Wildlife Service



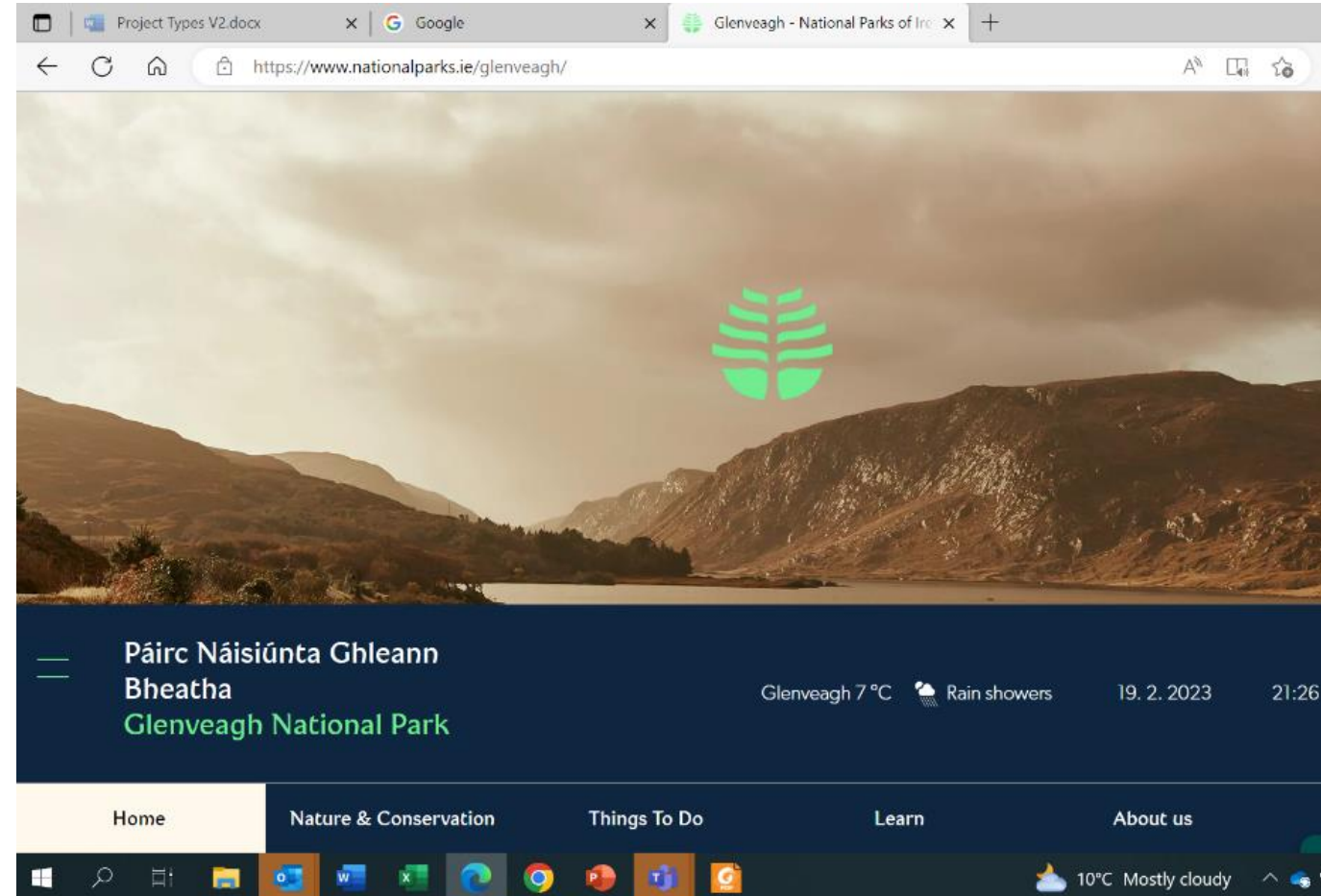
RRDF Partnership Project

Total Project Costs:

**€3,350,000**

Fáilte Ireland Funding:

**€418,750**





# Outdoor Recreation Infrastructure Scheme



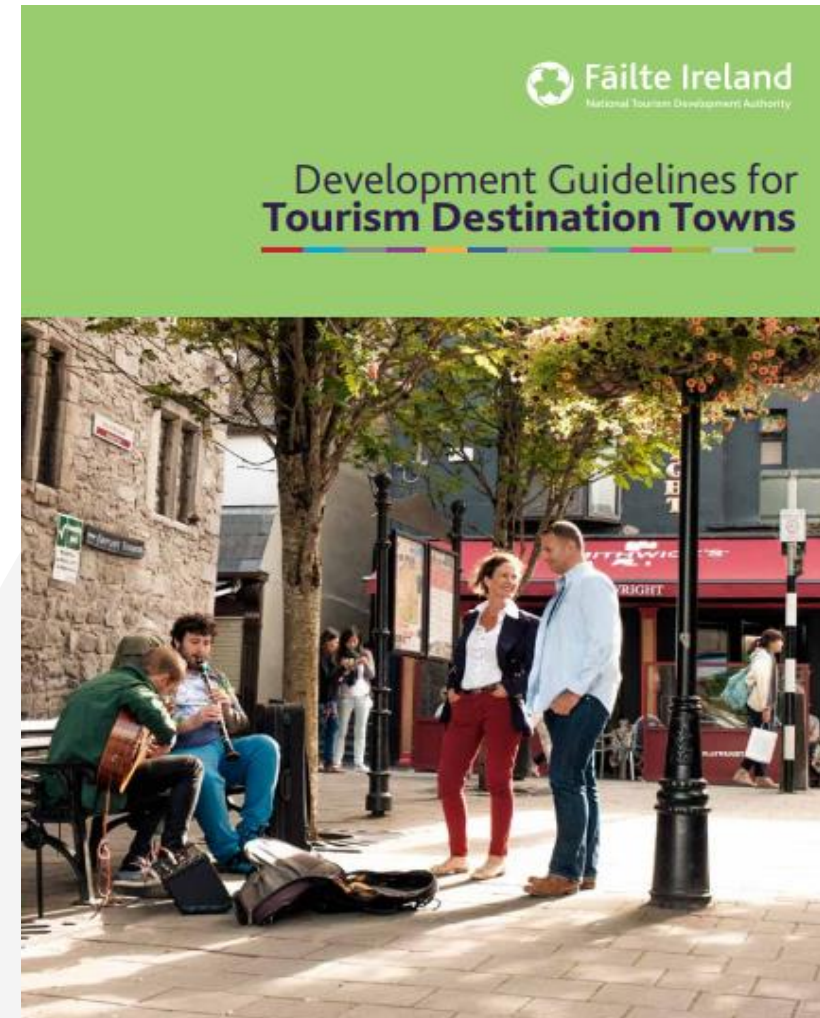
- Collaboration between the Department of Rural and Community Development & Fáilte Ireland 2018 - 2021
- Provides funding for a range of outdoor infrastructure projects such as; walking trails, greenways and blueways
- 224 projects completed across 25 counties totalling 14.6 Million (2019- 2022)
- 2022: Upgrade works at Knocknarea, Sligo (144K Investment)
- 2023: Hazelwood Forest Trail (123K Investment)



# Destination Towns



**Co. Sligo & Co. Donegal**  
**Fáilte Ireland Funding: €1m**  
**Expected Opening Date: Q3, 2023**



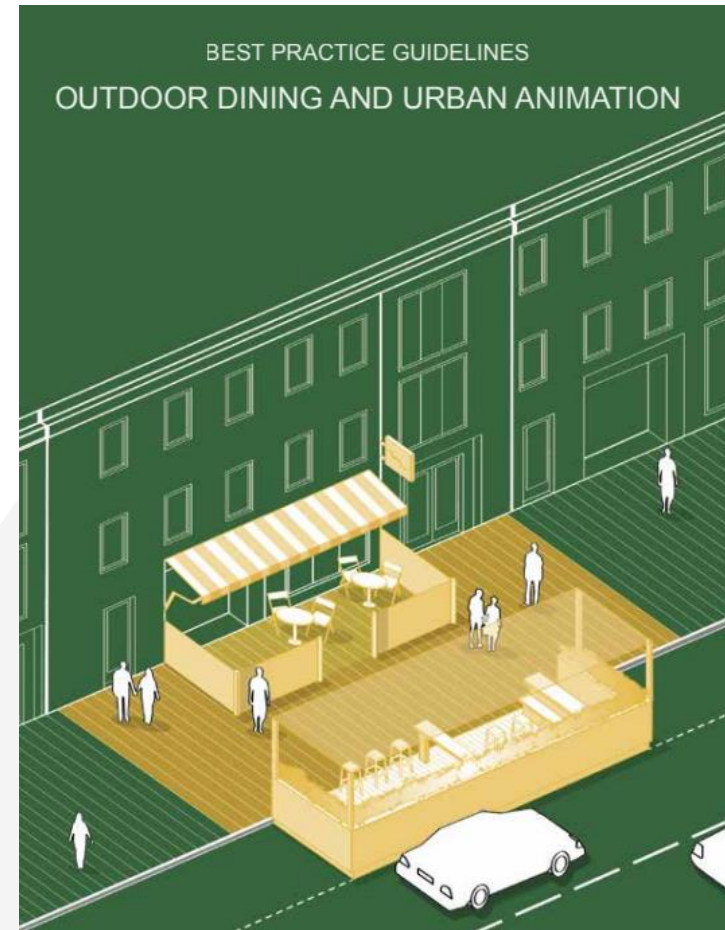


# Outdoor Dining Investments



Tobergall Lane & Enniscrone – Sligo

Letterkenny & Bundoran - Donegal





# Enterprise Supports

Martina Bromley – Head of Enterprise  
Development





# 2022 Supports

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**852** Businesses &  
**1928** Employees from  
*Wild Atlantic Way* businesses  
attended Fáilte Ireland  
training workshops and  
webinars in 2022

## Most popular Programme Areas:

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

# Challenges

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# Competitiveness

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**Reducing  
Costs**

**Increasing  
Revenues**

**Exceptional  
Customer  
Value  
Experience**

# 2023 Strategic Priorities

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## Reduction of Operational Costs

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



## Digitalisation

- Shop window is user friendly and easy to navigate for your customers
- Byte sized digital enhancements deliver big impacts with small investments
- Your website as a sales engine to drive more revenues.



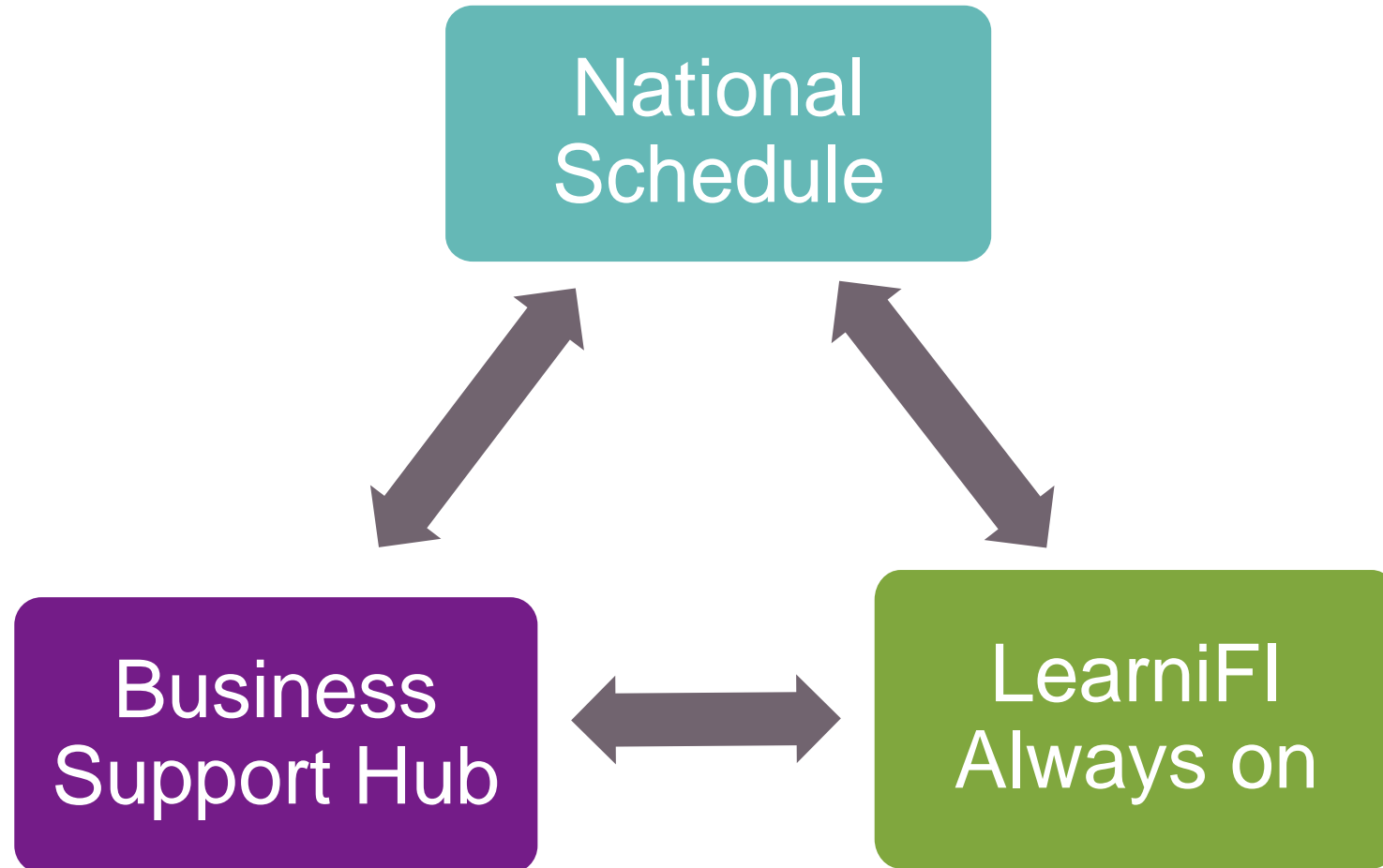
## Climate Action

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



# Engaging with Supports

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# National Schedule & Support Hub

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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



# Call to Action so now...

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- 1. Help your Business grow** – Speak to your local contact for further information on the programmes best suited to support your business grow 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**



# Panel Discussion

**Eleanor Hanna**

Hanna Hats

**Mick McEnroe**

National Surf Centre

**Gerry Moore**

Sligo Park Hotel

**Eimear Ní Mhathúna**

Fanad Lighthouse





# Marketing Overview

Donegal, Sligo and Leitrim

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 here 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



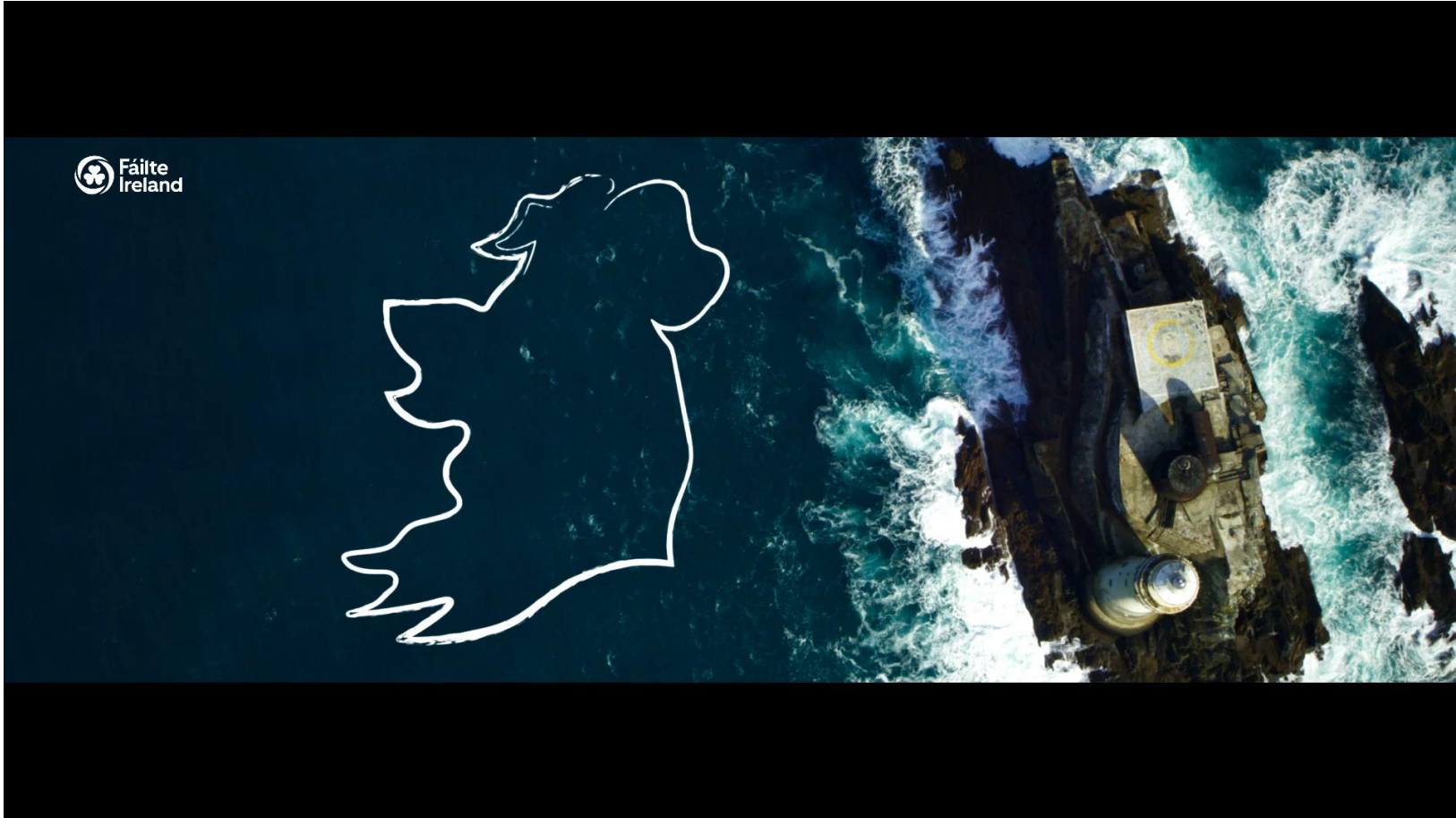
# Inspiring the nation through TV



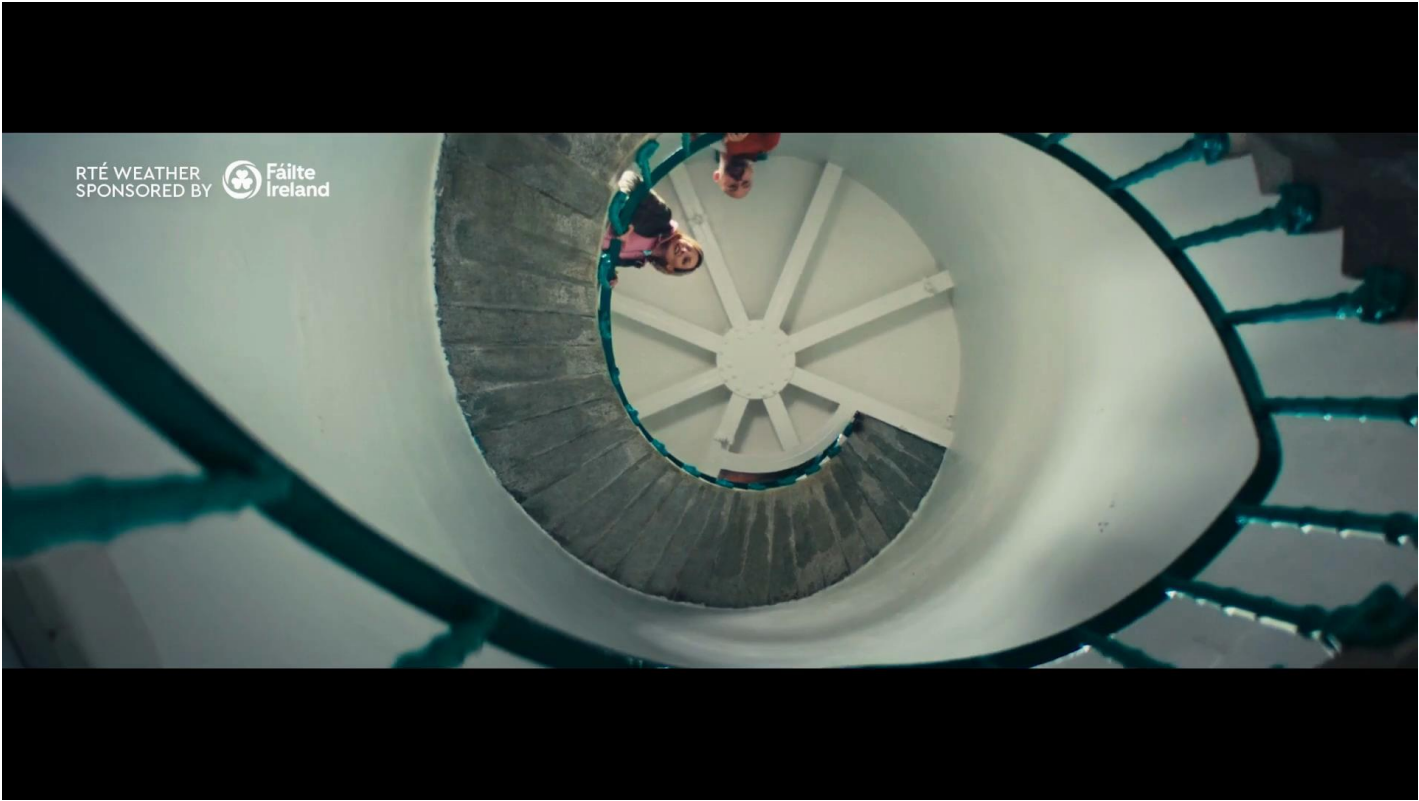
National  
TV  
across  
ROI & NI

Reaching  
55% of  
adults  
weekly

PLUS  
On-  
Demand



# Building salience through Ireland's largest broadcast sponsorship



**120**  
Stings per week

**1.6 Million**  
Average Weekly Reach

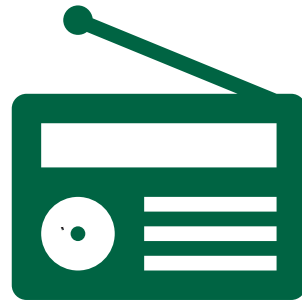
**8.3**  
Average Weekly Frequency



# Driving national reach via audio & press



National radio targeting ROI & NI



Online audio for extended reach

**Keep Discovering Leitrim**

**Ard Nahoo**  
WWW.ARDNAHOO.COM  
TEL: 087 921 8906  
Escape to the award-winning Eco-Retreat and Yoga School run by Noeleen and Brendan at Ard Nahoo in the Leitrim hills.

**The Organic Centre**  
WWW.THEORGANICCENTRE.IE  
TEL: 071 985 4338  
Have fun learning a new practical skill this spring-summer on one of our inspiring courses, or, simply come and wander around our extensive gardens and orchards.

**Adventure Gently**  
WWW.ADVENTUREGENTLY.COM  
TEL: 085 182 1547  
Discover the magic of travelling by canoe through the pristine waters of 'lovely Leitrim', whatever the season.

**Glencar Waterfall**  
Glencar Waterfall, ever beautiful, is described as one of the most enchanting areas in Ireland, and was the inspiration for WB Yeats' poem The Stolen Child.

Glencar Lake, Co. Leitrim

Ireland's Hidden HEARTLANDS | Leave No Trace

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

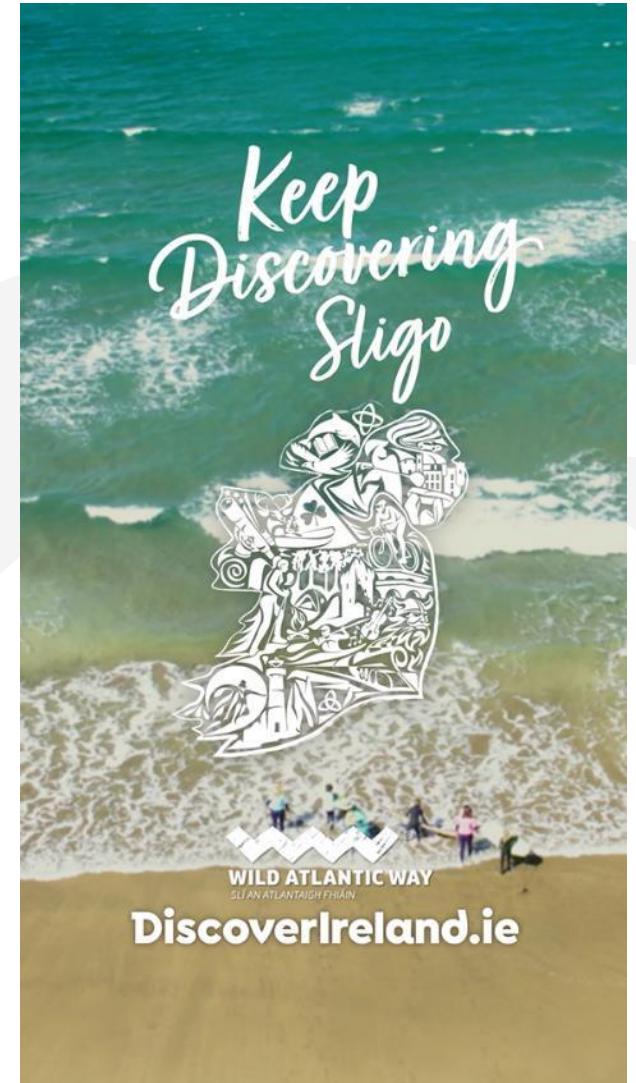
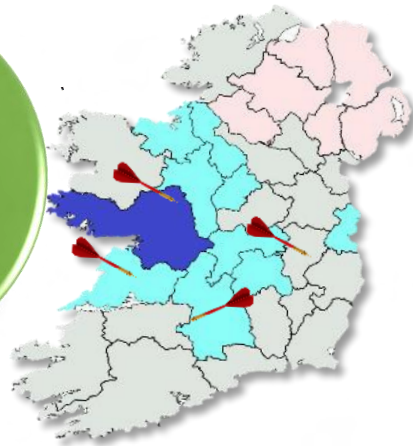
# Driving relevancy through digital & social



Geo-targeted ads

Within 2-hour radius

Always-on social





# Showcasing experiences via TV Partnerships...



**159K**  
**Reach**  
per segment



**130K**  
**Reach**  
per segment



**Total**  
**Partnership**  
**Reach**  
**1.6M**





# ...and Digital Partnerships



Food And Drink Counties Entertainment Sustainability Keep Discovering Music More +

## 8 amazing things to see and do along Donegal's Wild Atlantic Way

DiscoverIreland.ie

JOE HOME NEWS

TRENDING: Keep Disc

4 MONTHS AGO

### 6 things to see and do along Sligo's Wild Atlantic Way this autumn

herfamily HEALTH + OPINION + TRAVEL + FUN + KE

### 5 unforgettable family experiences along Sligo's Wild Atlantic Way

Shares f t i @ Save

HERFAMILY

brought to you by DiscoverIreland

22 Weeks  
58 items of  
content

Lovin

Keep Discovering

This Autumn discover coastal wonders, scenic hikes, island adventures or incredible city breaks.

Your next adventure starts here.

Lovin

WE FINISHED OUR TRIP AT THE DONEGAL EQUESTRIAN

5.8M  
Total social  
Reach

JOE HOME NEWS

TRENDING: Keep

JOE.IE

CS SHOWS MORE +

Dublin Out

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

Her Family

England's Hidden HEARTLANDS

### Go on a family welly wander through a forest with Mud Bugs in Co. Leitrim



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



Influencer Programme Reach 13.5M +

Useless Project Reach 35K+



Sunday Independent Reach 180K+



Press Reach 16M

## Just wild about Donegal

There's so much fun to alpaca in!

The food and friendliness is second to none, and my girls were fascinated with all its nooks and crannies. The next morning, the true beauty of the area revealed itself as we had breakfast at the hotel's Peninsula Restaurant, with panoramic views over Lough Swilly and the Buncrana Golf Club. The sandy shores along Lisfannon beach are next to the hotel grounds, and we could see them from our vantage point. My eldest daughter Lana Rose is going through a somewhat bizarre obsession with alpacas, so it was only a 15-minute drive from Donegal to our next stop, the Wild Atlantic Way, the gateway hotel. As it is in an area of stunning natural beauty, we set on a Friday afternoon and a couple of days on the Wild Atlantic Way, the gateway hotel. As it is in an area of stunning natural beauty, we set on a Friday afternoon and a couple of days on the Wild Atlantic Way, the gateway hotel. As it is in an area of stunning natural beauty, we set on a Friday afternoon and a couple of days on the Wild Atlantic Way, the gateway hotel.

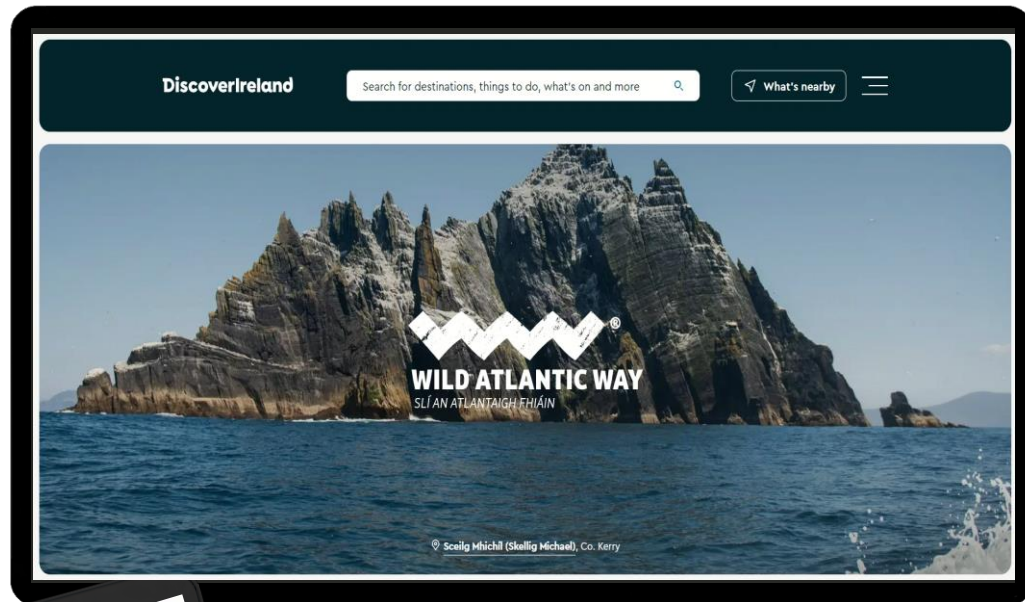
Irish Daily Mail Reach 37K+

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

Discover  
Ireland.ie

ilte  
land

  
WILD ATLANTIC WAY  
SLÍ AN ATLANTAIGH FHIÁIN



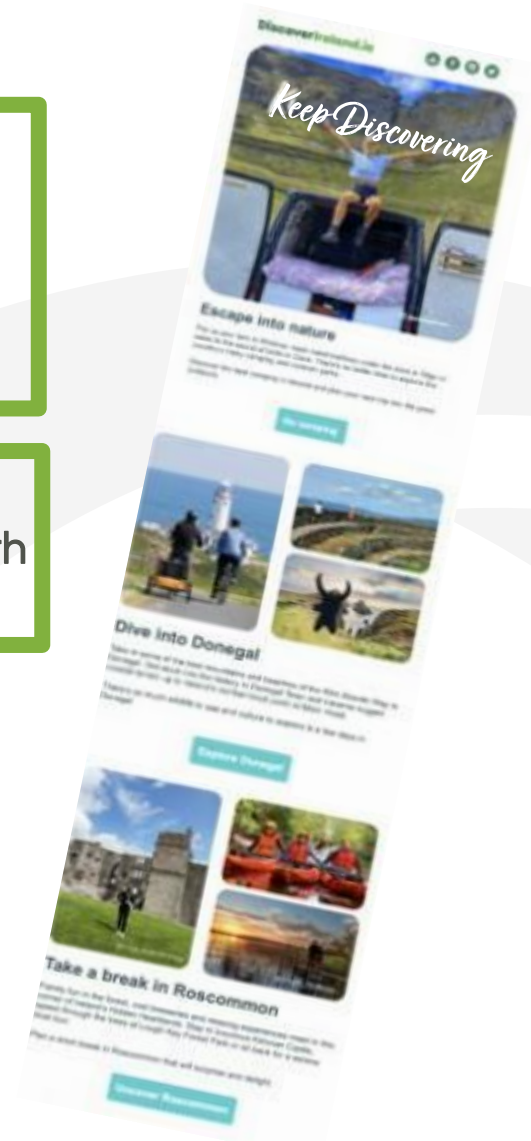
Emails Database: 60K

Open Rate: 30%

Published Twice a month

230,142  
Sessions

30,339  
Referrals





# Building communities on Social Media

  
**1.5m**  
Community Size

  
**4.9%**  
Average Engagement Rate



Meta



## Top Performing Posts



Benbulbin  
Views - 134k




Gweedore  
Views - 71k





Mount Errigal  
Views - 61k




Leitrim  
Views - 23k

 shanecrawford\_ Great video 🙌  
8w 1 like Reply

 sheenead Looooove this!!! 🤩🙌  
8w 1 like Reply

 rozannapurcell 🙌🙌🙌🙌  
16w 3 likes Reply

— View replies (1)

 smoothcruzinireland Wow, we really do live in a country with spectacular scenery 🤩  
9 w 1 like Reply ...



**13.2M**

Total Impressions



# How you can get involved





# Keep Discovering Industry Toolkit





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



# Key Takeaway

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# Commercial Development





# Commercial Development

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## 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

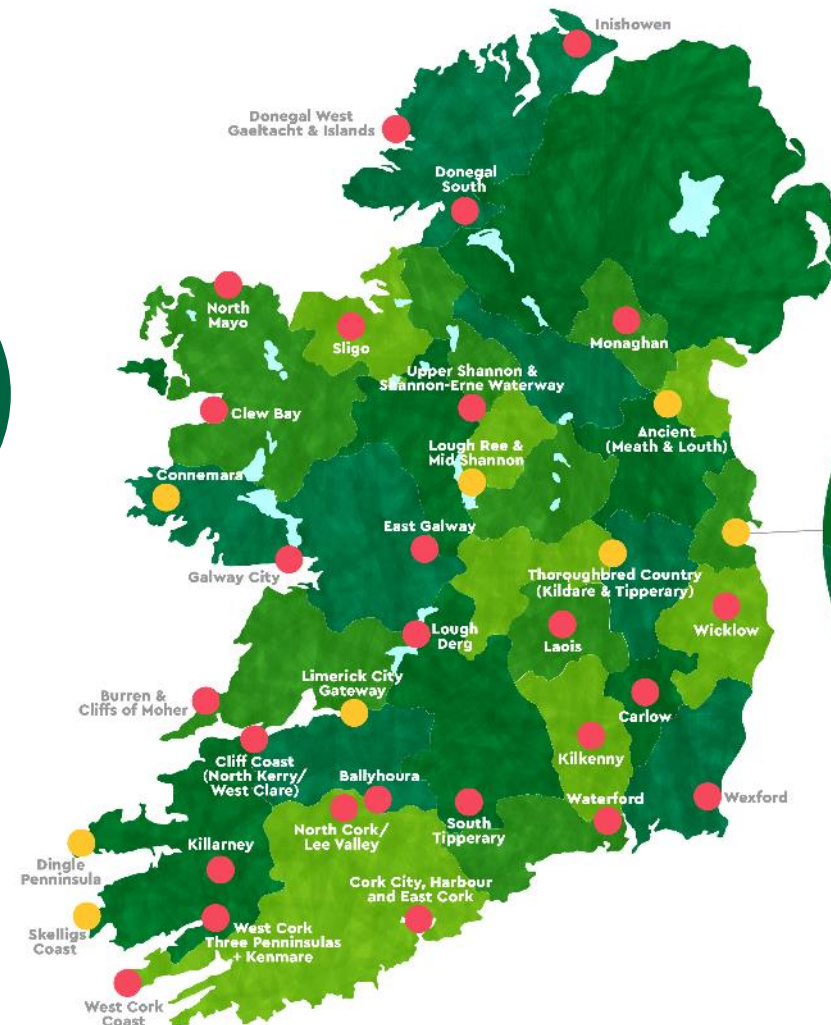
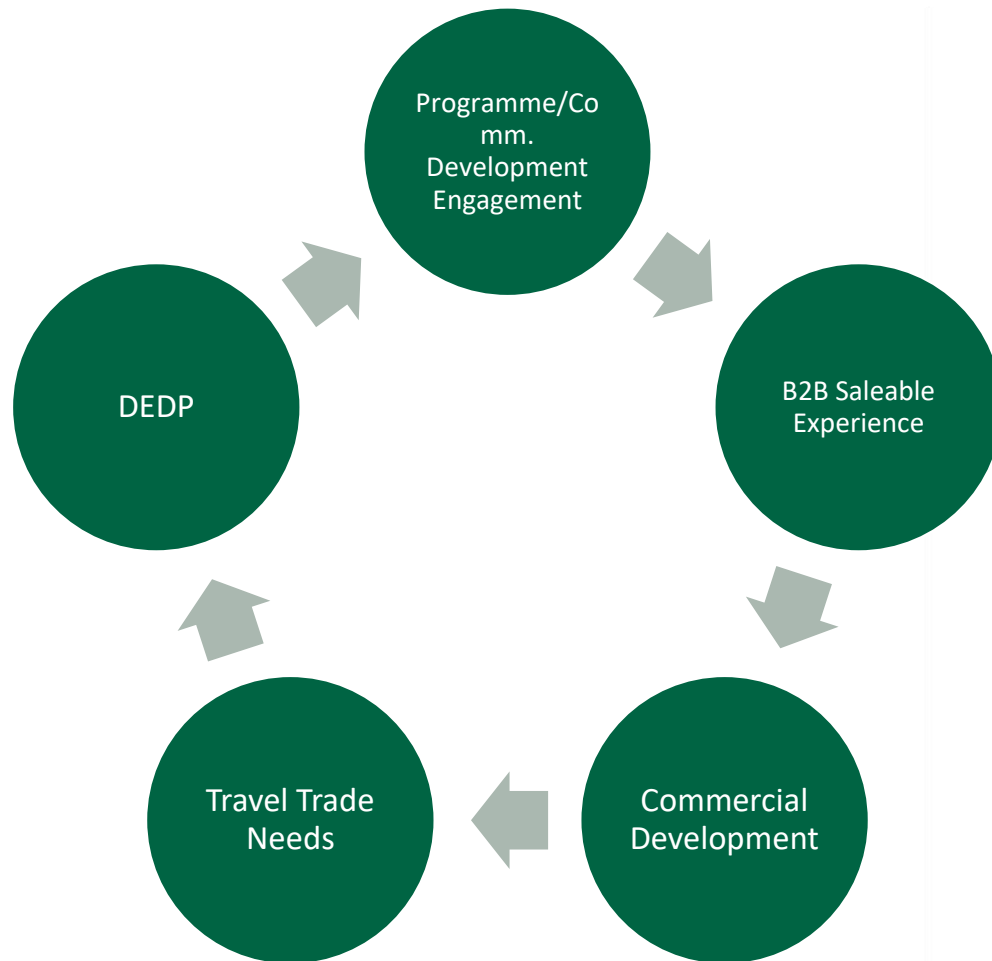




It  
and



# B2B Saleable Experiences



## 37 Local DEDPs

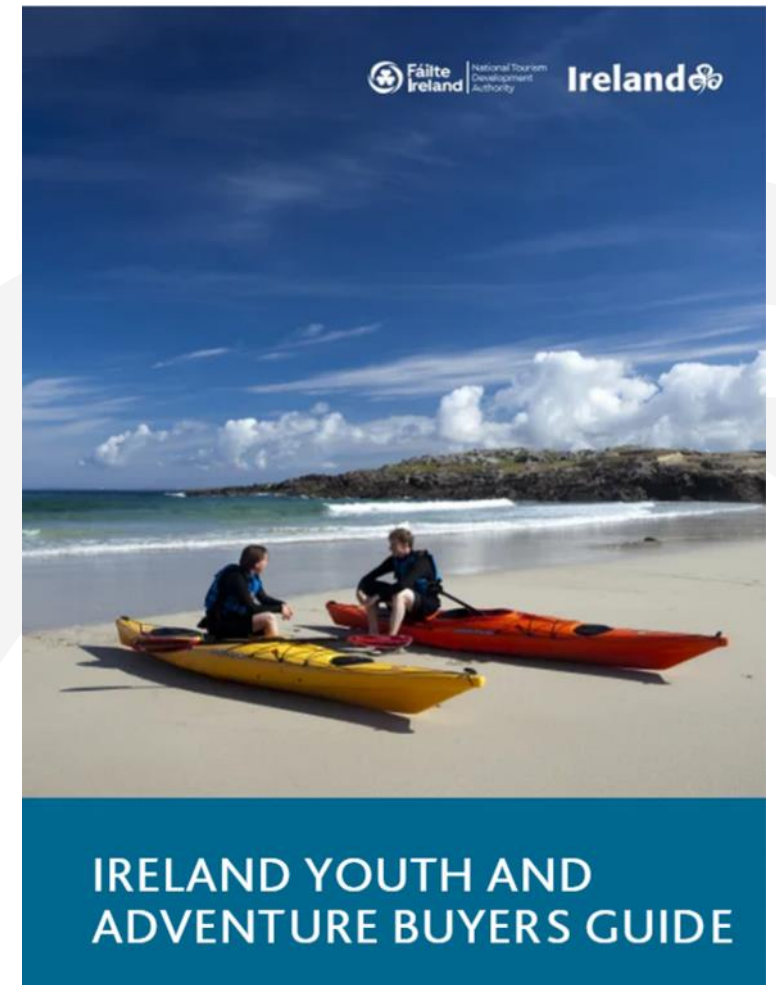
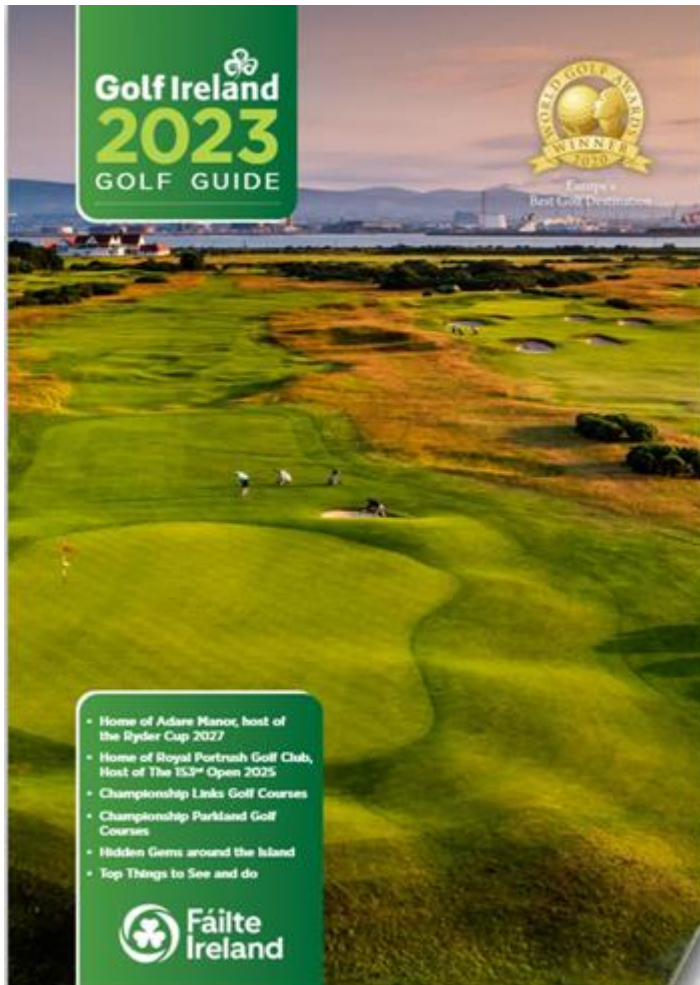


● 2022+ DEDP

● 2021 DEDP

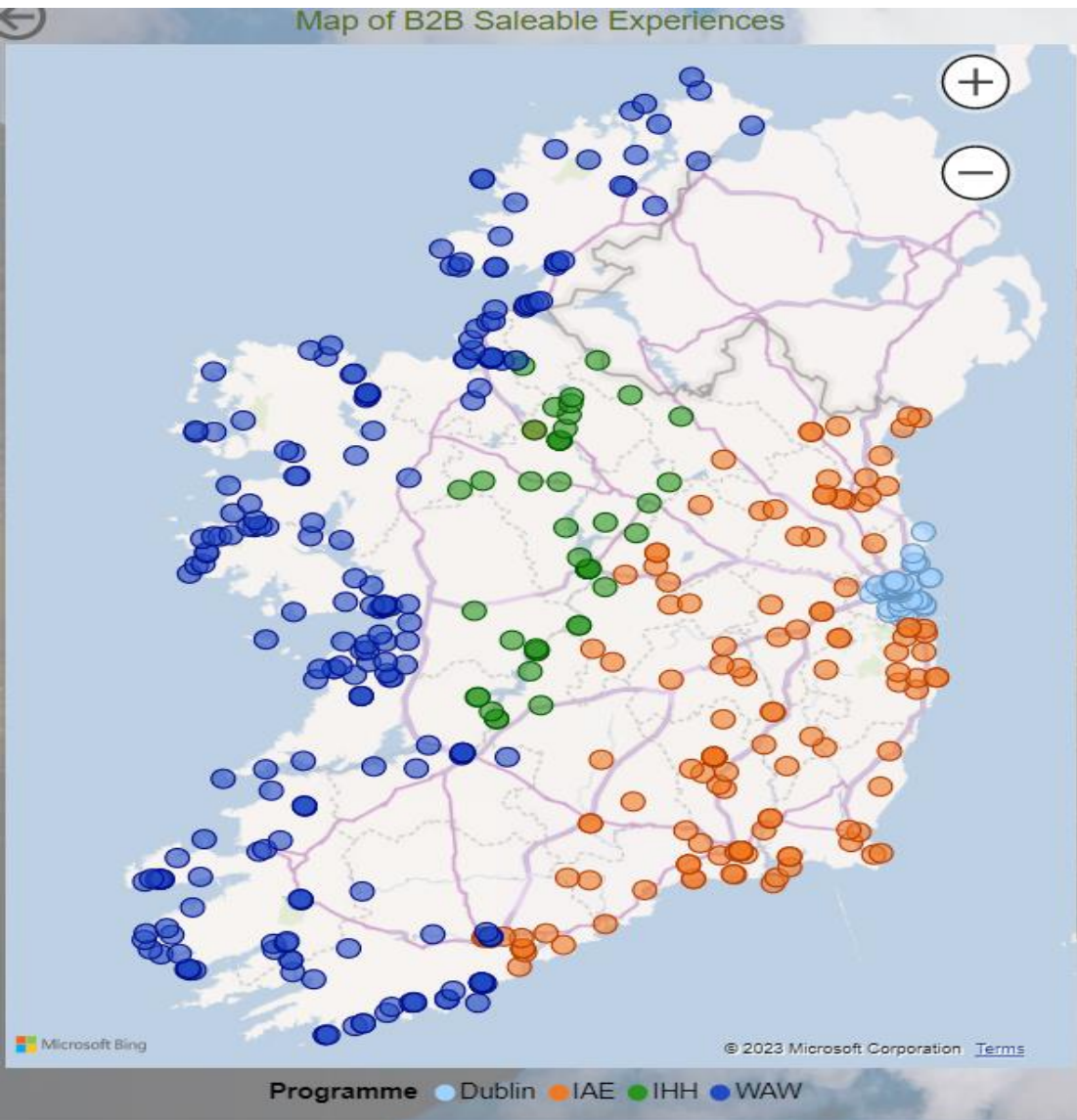


# Buyer Guides and Presentations





# 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



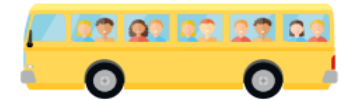
**15**  
Markets



**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



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

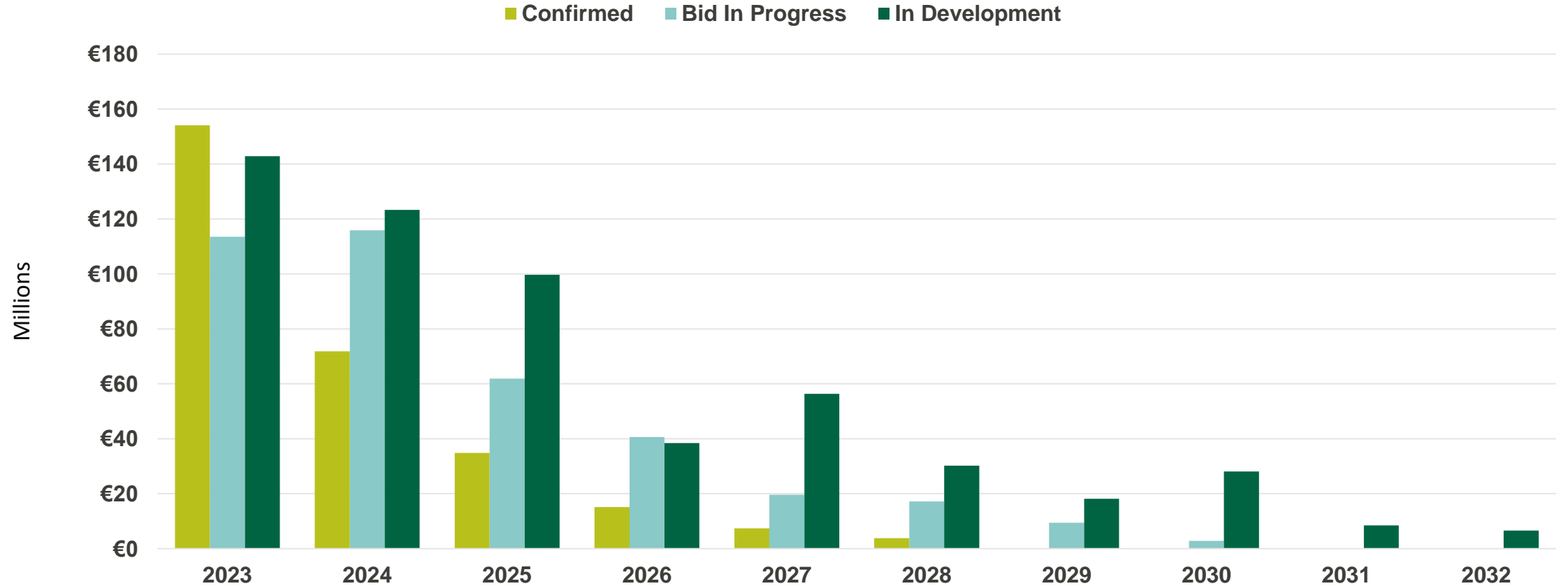
4  
Fams  
30+ buyers

20  
Overseas  
sales  
platforms

1  
Luxury  
Destination  
Showcase  
40 buyers



# Business Events Pipeline 2023 - 2032



€1.22bn  
Events Value

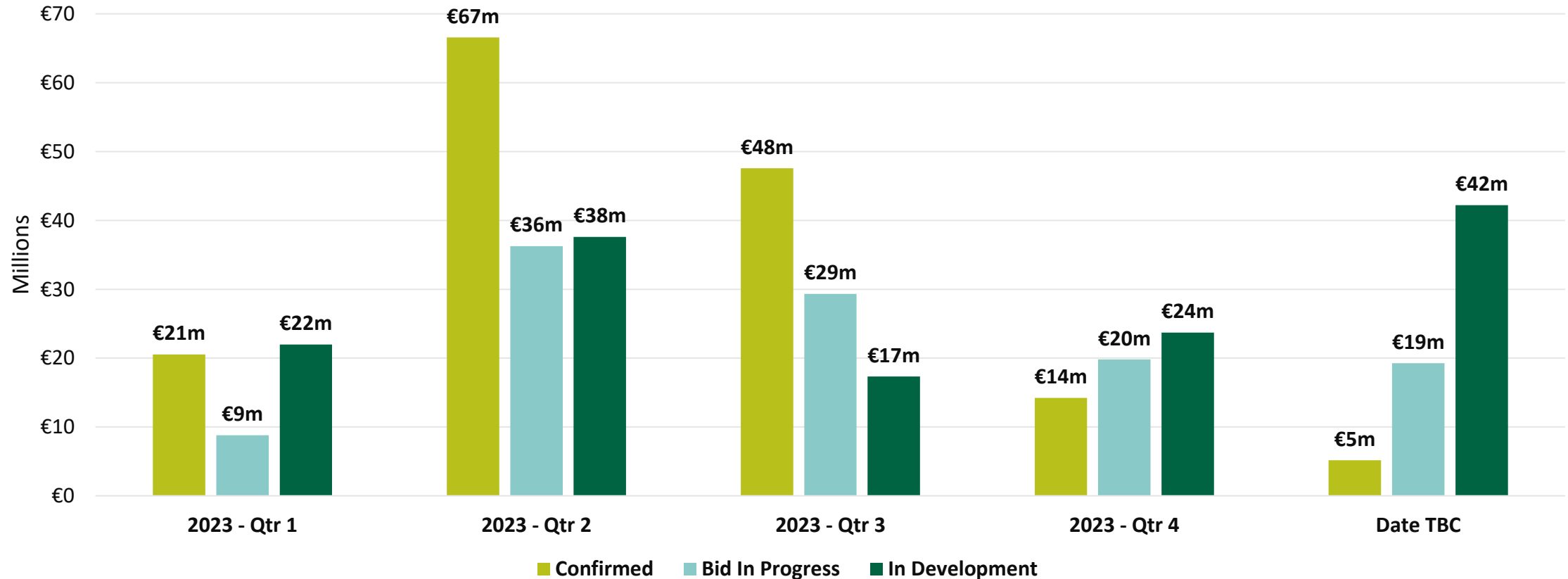
€287m  
Confirmed (24%)

€381m  
Bid Pending (31%)

€552m  
Bus. Dev (45%)

718k  
Int. Delegates

# Business Events: Event Year 2023



**€410m**  
Value Pipeline

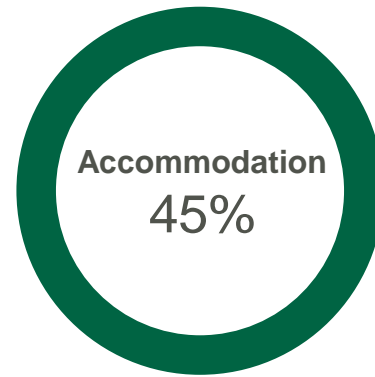
**€154m**  
Confirmed (38%)

**€113m**  
Bid Pending (28%)

**€143m**  
Bus. Dev (35%)



# Business Events Value



# 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



# Go Raibh Maith Agaibh



# Industry Day Enquiry form

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Scan the QR code to set up a 1:1 call with one of our team to discuss any of our content from the Regional Industry Briefing