

# **Tourism Ireland Business plan 2023**

Approved at 24 June 2024 NSMC.

# 1. Executive Summary

Inbound tourism has restarted following COVID-19, with approximately 75% of pre-pandemic tourist volumes been seen across the island of Ireland in 2022. In line with Tourism Ireland's recovery strategy, overseas marketing will now move to the REBUILD stage, where re-establishing industry revenues and profitability will be key in order to create a platform for sustainable growth.

2023 is the first year of Tourism Ireland's 2023-25 Corporate Plan. The Corporate Plan is the most sustainable yet, with social and environmental sustainability supporting the initial focus of economic sustainability. This is reflected in the Corporate Plan ambition to **rebuild holidaymaker revenue to pre-pandemic levels (accounting for inflation) while increasing focus on attracting value-adding tourism.**

The coming year offers an opportunity to build back to a sustainable future, however, it is not without challenges and risks. The war in Ukraine has created cost of living challenges for potential holidaymakers as well as cost and accommodation capacity pressures for the island of Ireland tourism industry. Although demand is generally high, competition is strong and effective marketing of the island of Ireland is critical to ride the risks ahead.

Working with industry, government and our sister agencies, Tourism Ireland will invest in key source markets around the world to ensure the island of Ireland is front and centre in holidaymakers consideration.

## Key activity for 2023

A large-scale programme of activity is planned for 2023 including:

- **A new revenue-building global campaign** -What Fills Your Heart (WFYH) – will be launched around the world. The campaign will focus on the REBUILD objectives and feature TV ads in our top four markets (GB, US, Germany and France) as well as localised targeted ad executions in all target markets across the globe.
- **A comprehensive programme of supporting campaigns** will expand on the main campaign with a concentration on encouraging value-added tourism. These campaigns will exploit events and opportunities to amplify the island of Ireland message and utilise occasions such as St. Patricks Day and Halloween to dial up the unique proposition on offer.
- **Always-on consumer communications** will include digital (Ireland.com, direct and social channels), search, paid content seeding and publicity.
- **Industry offers** and links will continue to be present across consumer communications, particularly Ireland.com and direct marketing channels
- **A three-year TV programming fund** will be established to enable large-scale multi-year projects that showcase and are filmed on the island of Ireland as part of TV shows and films around the world.
- **Industry support** will continue with a re-launched IMAP programme helping fund partners to sell the island of Ireland overseas.
- **A key account management** approach will be rolled-out to maximise the opportunities from trade partners around the world.
- **Northern Ireland and the regions of Ireland** will be featured across all activity, highlighting to the world the high quality attractions, experiences and events across the island of Ireland.
- **Tourism Ireland's Martech infrastructure will continue to optimise our digital communications** as the propensity model is fully established
- **A new management and leadership training** programme will be established, and employee engagement benchmarking introduced.

## 2. 2022 In review

The easing of COVID restrictions, release of COVID savings and pent-up demand resulted in better than expected demand for travel. Official visitor statistics are not yet available, however, estimates suggest around 75% of pre-pandemic inbound tourists came to the island of Ireland during 2022.

Strong demand was evident across the world however, the year was not without challenges. The Omicron variant meant international travel was restricted for the initial months of 2022. As restrictions eased, the war in Ukraine created cost and capacity pressures. Supply issues were also present across areas such as car hire and airport security all leading to an on-going series of dampening factors.

Against the backdrop of the ever changing environmental factors, Tourism Ireland was able to use the increased investment provided in 2022 to build solid foundations for long-term growth as well as to ensure the island of Ireland was front and centre when holidaymakers were choosing where to go.

- The Green Button campaign was the most prominent ever run by Tourism Ireland
  - At the time of writing – with data from the first three quarters of the year – the campaign had been seen by approximately 300m people.
  - Spontaneous recall of the campaign in April 22 – at the height of the campaign – was 11% among GB holidaymakers (up from 7% pre-campaign), 8% in the US (up from 3%), 5% in Germany (up from 2%) and 24% in France (up from 12%).
- In-excess of 1 billion opportunities to see publicity content about the island of Ireland have been created across inbound markets.
- Over 2,500 industry offers have been presented on Ireland.com in the first three quarters of 2022 supporting the almost 6 million potential holidaymaker referrals made to industry sales platforms.
- Almost 250 industry partners successfully applied for funding as part of the Industry Market Access Programme (IMAP) enabling their role as part of the salesforce for the island of Ireland overseas.

In addition to the demand building activity achieved through campaigns and promotions, in 2022 Tourism Ireland also:

- Developed its most sustainable Corporate Plan which puts economic, social and environmental sustainability at the heart of activity going forwards. Including wide consultation with our top-trade and industry partners around the world.
- Increased our digital technology optimisation utilising our Martech to deliver more targeted on-point communications to our audiences.
- Created a new consumer campaign to support the move to rebuilding industry revenues – What Fills My Heart – leveraging celebrity, influencer and holidaymaker advocacy to demonstrate why consumers should holiday on the island of Ireland.
- Continued to ensure the most up to date and relevant research of consumer behaviours and attitudes is available to inform industry, Tourism Ireland, our sister agencies and wider public sector activity, including research into future sustainable tourism initiatives
- Conducted industry webinar programme to communicate with industry and trade around topics such as consumer sentiment
- Began a major refresh of the inbound holidaymaker segmentation to ensure the island of Ireland message is targeted at our best prospect audiences.

The 2022 Business Plan was finalised in autumn 2021 shortly afterwards Tourism Ireland received an additional €30 million to market the island of Ireland overseas. This significant increase in investment resulted in a need to update the organisation's plans and targets. An Operation Plan was written and approved by the Board. The plan set out the following measurement indicators.

## 2022 Operations Plan – key performance indicators

### Marketing effectiveness

<ul style="list-style-type: none"> <li>- Welcome 7.2m tourists to the island of Ireland in 2022 (64% of 2019 levels)</li> <li>- 6.2m to Ireland (64% of 2019 levels)</li> <li>- 1.4m to Northern Ireland (64% of 2019 levels)</li> </ul>	<p>This data is currently unavailable. Based on an assessment of available data (eg CSO Arrivals, daa, CAA), it is anticipated around 75% of pre-pandemic tourists will visit the island of Ireland during 2022. Ahead of the targeted volume.</p>	
<p>Green Button campaign to have been seen by 150m potential visitors by end 2022</p>	<p>As at Q3'22 an estimated 309m consumers have been reached</p>	
<p>Develop a new marketing effectiveness metric, utilising our enhanced marketing technology capability, that can assess the impact of our communications at an individual consumer level – proposed model will be presented to the Tourism Ireland Board</p>	<p>Work on a new marketing effectiveness metric is still underway. The project relies on sufficient tourists been 'seen' on the island of Ireland (based on mobile phone records). It is expected this will be completed in early 2023.</p>	

### Sales facilitation

<p>Deliver 3.2m commercial third-party digital referrals in 2022 to help industry close the sale</p>	<p>As at Q3'22 an estimated 5.9m commercial third-party digital referrals were made from Ireland.com</p>	
<p>Make industry offers available as part of the Green Button campaign from launch to end of 2022</p>	<p>By the end of Q3'22 there were over 2,500 industry offers available as part of the Green Button campaign</p>	

### Preparing for REBUILD

<p>Present a redeveloped segmentation model to the Tourism Ireland Board for approval by end 2022</p>	<p>Development of a new segmentation is underway – the programme was delayed to enable consumer travel patterns to normalise post-Omicron. A new model is anticipated early 2023.</p>	
<p>Deliver the 2023-2025 Corporate Plan by end 2022 with sustainability at the heart of the plan</p>	<p>Completed</p>	

### Tourism Ireland the organisation

<p>The Tourism Ireland employer brand measurement achieves a top quartile performance as evidenced by a Staff Satisfaction rating of 80+%</p>	<p>A slightly different engagement measure was used based around trust. The trust score was 79%.</p>	
<p>Financial stewardship: no priority 1 audit findings and administer expenditure in line with +/- 1% variance threshold</p>	<p>No priority 1 items in the internal audit reports completed in the year to date and as at Q3 +/- 1% variance threshold is expected to be achieved</p>	

[Green – completed / Amber – on-going or changed / Red – incomplete / Grey – changed/n/a]

The original 2022 Business Plan measurement indicators along with the achievement against each factor are set out in an appendix to this document.

### 3. 2023: Year one of the Corporate Plan

The 2023 plan starts Tourism Ireland on the path to deliver the Corporate Plan ambition:

***Rebuild holidaymaker revenue to pre-pandemic levels (accounting for inflation) while increasing focus on attracting value-adding tourism***

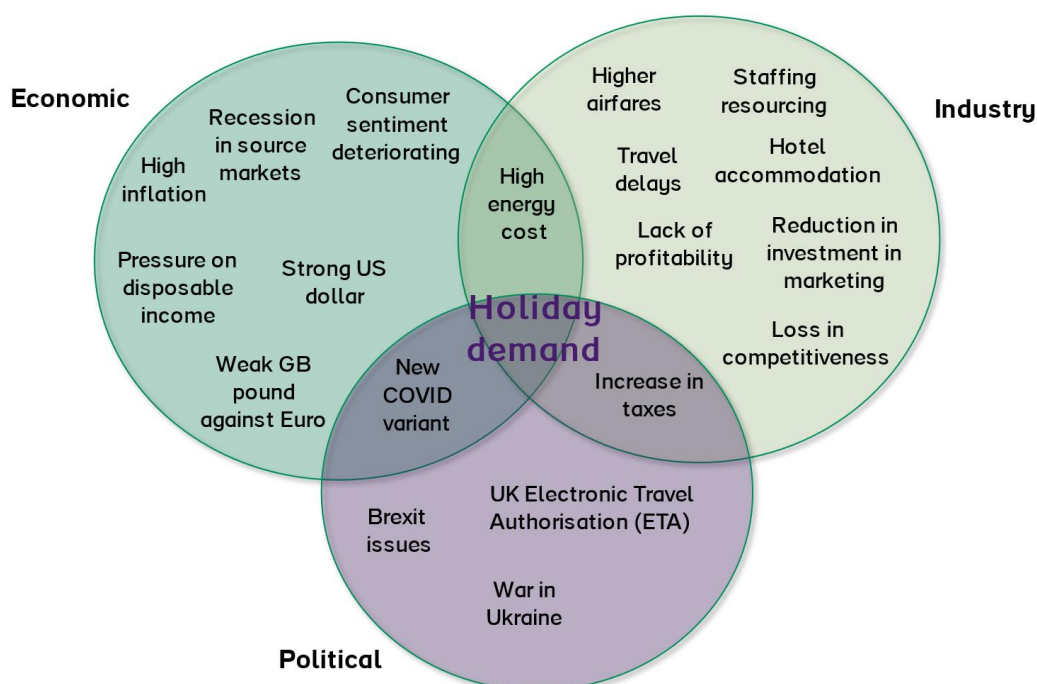
Three pillars will span 2023 activity:

- Economic sustainability (ensuring tourism businesses across the island of Ireland build back to a stable financial position)
- Social sustainability (ensuring that communities see and recognise value from inbound tourism)
- Environmental sustainability (ensuring that inbound tourism is not growing at any cost and that environmental considerations are baked into decision making).

Encouraging value added tourism is central to the deliver across the three pillars with increasing promotion to attract those spending more, staying longer across the whole island, and with a lower environmental impact.

While social and environmental sustainability ambitions are at the core of this plan, the initial focus is on economic sustainability. A financially stable industry is required for a thriving sustainable inbound tourism eco-system.

It is clear the industry is facing into a period of significant risk. The diverse range of current and emerging economic, political and industry pressures are concerning. Tourism Ireland’s consumer research also identifies how risks are increasingly impacting holidaymakers thinking and planned behaviour.



#### Business tourism

At the time of writing, details are yet to be confirmed – Business Tourism activity is therefore not included in this plan.



## Business Plan summary

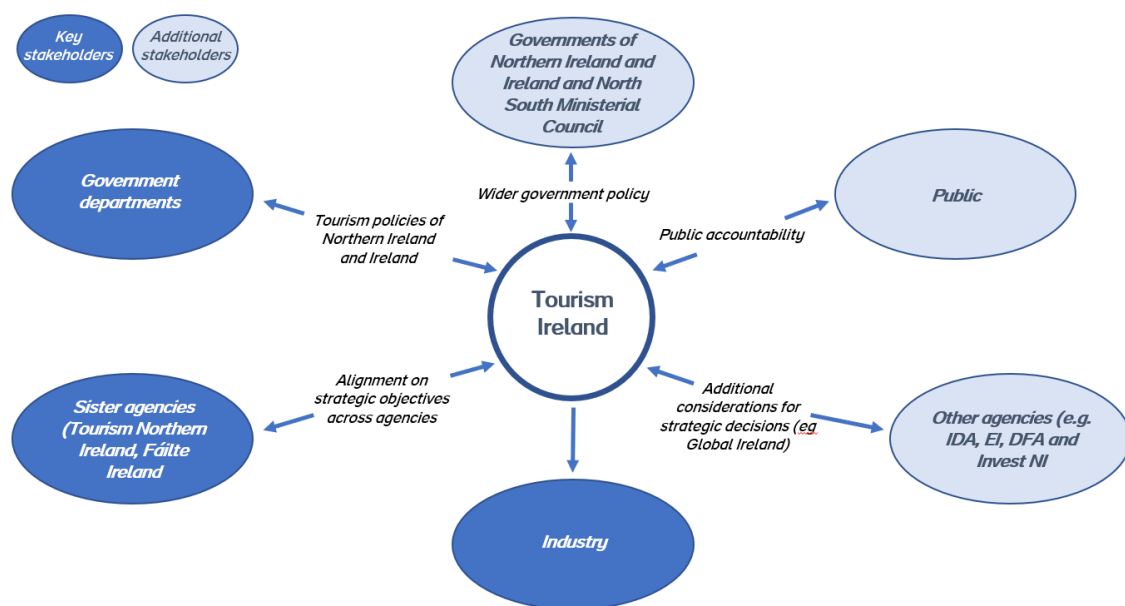
Reflecting the Corporate Plan ambition, the risks present in the market and the focus on REBUILD for 2023. Tourism Ireland has built this business plan across two main areas – developing high quality consumer demand and helping the industry to facilitate the sale with trade and consumers overseas.



Tourism Ireland’s marketing activity is supported by a world class organisation which is developing to meet the needs of the plan and to support the industry through the high-risk environment of the coming years.

### Collaboration

Tourism Ireland does not operate alone, the plan relies on cooperation and collaboration with industry, sister agencies, the public sector and a wide range of stakeholders.



### Sustainability

In addition to economic sustainability goals, during 2023 Tourism Ireland will increasingly undertake activity aimed at enhancing social and environmental sustainability, including:

- Market ‘twinning’ (where markets have a particular focus on a region or regions of the island of Ireland) will continue to encourage regional growth
- Publicity, trade and media activity including visits to the island of Ireland will increasingly focus on sustainable product
- Working with stakeholders Tourism Ireland will support the development of sustainability initiatives (such as certification) and strategy
- Supporting campaigns will increasingly focus on value added tourism
- The Board sub-committee Sustainability Action Plan will also drive activity in this area

## Consumer demand

### Main campaign: What Fills Your Heart (WFYH)

To support the REBUILD activity and deliver high value holidaymaker demand a new campaign has been developed. The campaign builds on the Fill Your Heart With Ireland brand platform to create demand by demonstrating how a holiday on the island of Ireland can bring **joyful immersion**. Achieved through the island of Ireland’s **character** (surprising, authentic, spontaneous and ‘only here’ experiences) and **characters** (engaging people, freely giving of our culture in fun, engaging, human and conversational ways).

The new campaign will demonstrate how the island of Ireland fills the heart of celebrities, influencers and real-life holidaymakers to win share amongst a more affluent holidaymaker audience. The key objective is revenue generation, but regional and shoulder period hooks will be built-in.

Launching in Q1 2023, the campaign will be deployed across all consumer activity and will dial up authenticity to validate the message.

- Hero assets will be created for use across TV and social platforms
- Out of home, print advertisements and social content will carry quotes from island of Ireland and local market celebrities
- Influencer content will feature characters from across the island and revolve around the joyous experiences that fill their hearts
- Trade and co-op activity will echo the What Fills Your Heart message. Toolkits and guidelines will help operationalise the campaign across the globe.

The content, timing and targeting of the campaign has been informed by Tourism Ireland’s consumer insights.

### Launching the campaign around the world

GREAT BRITAIN	NORTH AMERICA AUSTRALIA & NZ	MAINLAND EUROPE
<ul style="list-style-type: none"> <li>- <b>A new strategic approach</b> focused on high-reach, attention channels will be deployed making greater use of channel knowledge.</li> <li>- <b>Campaign launched</b> with TV as the primary channel to drive high impact, qualified reach, supported by alternative broadcast channels (e.g. broadcast video on demand, cinema, radio) to maintain top of mind awareness and attention to mitigate rising TV inflation. Two key bursts of activity (March-May &amp; Sep-Nov)</li> <li>- <b>Diaspora and Irish/Northern Irish celebrities</b> utilised across the campaign.</li> </ul>	<ul style="list-style-type: none"> <li>- <b>Campaign launched post St Patricks day with strategic bursts of integrated TV (US)</b> and digital media, underpinned with 'always on' paid digital.</li> <li>- <b>WFYH will launch later in the year in Australia and NZ</b> reflecting the different booking patterns of the market.</li> </ul>	<ul style="list-style-type: none"> <li>- <b>Launch new campaign</b> at the beginning of March across Europe with a mix of broadcast TV, catch up TV and digital.</li> <li>- In Germany, a second burst will be undertaken in September with a digital focus.</li> <li>- In France, a follow up Autumn burst will be undertaken during the Rugby World Cup using key WFYH themes with rugby legends.</li> <li>- Digital channels will be fully used across all European markets to ensure reach.</li> </ul>



## Supporting campaigns

In addition to the main What Fills Your Heart campaign a series of supporting campaigns will have particular focus on encouraging value-adding tourism i.e. regional, shoulder and environmental messaging.

Campaigns will include a mix of content creation, paid and own-channel activity centring around events, festivals and specific passion points or opportunities including:

ST PATRICK'S DAY	HALLOWEEN	TRADFEST	VALENTINE'S DAY	MARKET OPPORTUNITIES KERRYGOLD 50 RIVERDANCE
EVENTS: COLLEGE FOOTBALL RUGBY WORLD CUP	BRAND PARTNERSHIPS	SCREEN TOURISM	LUXURY	PASSION POINTS: GOLF OUTDOOR ACTIVITIES

2023 will see the island of Ireland being represented in film and TV around the world: Banshees of Inisherin, Dungeons and Dragons (showcasing Northern Ireland) and Vikings Valhalla (highlighting Ireland's Ancient East) will all provide high profile exposure. Tourism Ireland will use publicity, social and influencer activity as appropriate to reinforce the screen tourism opportunity.

Influencer Marketing will be one of the key channels to delivering the message throughout the year. This will also increasingly focus on value-added tourism messages. As part of supporting this, a retender for the influencer relationship management contract will take place in 2023. This will include a review of all measurement and platform requirements and will facilitate best use of this channel. It will also support sourcing of the most aligned creator/influencer partners.

In addition, during 2023, a number of related activity streams will be undertaken to further enhance the marketing of the island of Ireland overseas including:

- Establishment of an **innovation fund** to support the development of assets, to maximise in-year opportunities. At least one innovative activity will be developed during 2023, focused on value-adding tourism messaging.
- **Diversity and inclusion in marketing content** - an audit will be undertaken to assess current available assets, with guidelines for future content development, and a programme put in place to address any identified gaps.
- The **creative ad agency** contract will be retendered, with a new contract in place during 2024.

## Supporting campaigns around the world

GREAT BRITAIN	NORTH AMERICA AUSTRALIA & NZ	MAINLAND EUROPE
<ul style="list-style-type: none"> <li>- <b>Media partnerships</b> will bring the ‘characterful people of the island of Ireland’ to life under the new brand campaign.</li> <li>- <b>Rugby World Cup</b> opportunity will be exploited with key messaging delivered by rugby legends in a social campaign.</li> <li>- <b>The Open &amp; Ryder Cup</b> will be leveraged as opportunities to highlight and promote the world-class golfing in Northern Ireland and the regions of Ireland.</li> </ul>	<ul style="list-style-type: none"> <li>- <b>Brand partnerships</b> will be implemented with key travel and non-travel brands to extend reach with new and ‘high value’ audiences.</li> <li>- <b>Tourism Ireland’s ‘Moments Strategy’</b> will be established to exploit occasions such as Valentine’s Day/St Patricks day, Fall/Halloween.</li> <li>- <b>Diversity &amp; Inclusion</b> – Leveraging publicity activities to reflect the diversity of our audience, with a focus on LGBT+ holidaymakers.</li> <li>- <b>2023 Aer Lingus College Football Classic:</b> (Notre Dame v Navy) – a key partnership marketing programme will be implemented.</li> </ul>	<ul style="list-style-type: none"> <li>- <b>Brand partnerships</b> - Co-operative marketing campaign with Kerrygold in Germany to celebrate their 50 years in the market and synergise with this highly resonant brand. Developing new collaborations to promote luxury, golf and activities segment e.g. Volkswagen.</li> <li>- <b>Access</b> – Regional Access Roadshow with supporting consumer activity in Italy, Germany, Netherlands and France. Upweight activity in Normandy, Brittany and Northern Spain to promote the "Motorway of the Sea" and promote new ferry routes (e.g. Dunkirk-Rosslare)</li> <li>- <b>PR stunts</b> – creating and capitalising on “uniquely Irish” opportunities e.g. Irish Week in Milan; Riverdance.</li> <li>- <b>City Break campaign</b> – taking place in Q3, promoting season extension, 'Winter in Dublin' and Belfast.</li> <li>- <b>Sustainability</b> – collaborations with sustainable brand partners.</li> </ul>

In addition, **Trade and media familiarisation trips and communications** in all markets will see the island of Ireland and particularly sustainability messaging embedded throughout.

## Consumer communications

Tourism Ireland maintains 'always on' communication channels backing up campaigns with regular promotional and informative content.

### Ireland.com

Visited by 20 million people a year, Ireland.com provides a core promotional platform for the island of Ireland around the world. During 2023 Tourism Ireland will:

- Continue the **optimisation of performance** to progressively develop the content and experience of the website
- **Deliver content** to support both the main and supporting campaigns
- Manage the **industry offers programme** and continue to prioritise and facilitate **third-party referrals**

### Personalised communications

Tourism Ireland has a number of ways to communicate with prospective visitors including email, social and re-targeted advertising approaches. Direct communications are optimised by Tourism Ireland's Martech infrastructure which predicts the most impactful communications for each individual (the Next Best Action that can be taken to encourage a visit to the island of Ireland). During 2023 Tourism Ireland will:

- Continue to invest and grow the **10:1 return on advertising spend** initially delivered by the Martech programme
- Continue to **personalise communications** through the Next Best Action programme, customised emails and website personalisation

### Search and paid content seeding

As prospective holidaymakers search for terms relating to the island of Ireland and holidays and/or scroll through content on social media, targeted ads promote trip planning on Ireland.com to ensure maximum impact on likelihood to visit. During 2023, Tourism Ireland will:

- Increasingly optimise the activation of search and paid content seeding to **manage costs**
- Ensure **always on activity** is optimised to support campaigns such as St Patricks day and Halloween and explore the use of search for **demand generation**
- **Increasingly focus paid content** on value-adding tourism aligned with Corporate Plan objectives

### Social media strategy

Social media is well established as a critical channel to market the island of Ireland. This will continue into 2023 where Tourism Ireland will:

- Conduct amplification projects to increase **earned audience**
- Continue to effectively promote island of Ireland across **social media channels**

## Publicity and programming

The significant interest in the island of Ireland amongst the world’s press and media outlets offers huge opportunity for publicity and programming around the globe. The authenticity that is provided via these channels is known to be extremely compelling and effective in driving demand for the island of Ireland.

- A **pan-market PR strategy** will be developed, including the sourcing of an agency with expertise in global PR programmes, by end Q3 2023. This will support the existing local expertise to take advantage of increasingly common multi-market opportunities.
- **Publicity Evolution** - Tourism Ireland has invested in bespoke monitoring and evaluation of media performance which will enable insights for publicity strategy and content planning.
- **TV programming fund** – this three-year programme will support broadcasters to create long-form engaging content. It will enable greater showcasing of Northern Ireland, regional, shoulder and environmental messaging.

## Consumer Communications around the world

GREAT BRITAIN	NORTH AMERICA AUSTRALIA & NZ	MAINLAND EUROPE
<ul style="list-style-type: none"> <li>- Upweight messaging on <b>ease of travel</b>.</li> <li>- Exploit opportunities from prime-time TV programmes currently in production including <b>Wild Isles/David Attenborough</b> TV series: a stunning five-part series featuring Ireland’s nature and wildlife.</li> </ul>	<ul style="list-style-type: none"> <li>- Targeted information push with key content themes to cover island of Ireland <b>passion points and experience brands</b> plus increased focus on <b>sustainability, luxury, and slow travel</b>.</li> <li>- Implement <b>'Seeing is believing' influencer strategy</b> – dialling up regional growth and season extension with new and existing media contacts.</li> <li>- <b>Maximise Screen Tourism opportunities</b> including a co-branded campaign with United Airlines and digital streaming deal (Netflix/Hulu) to promote the Ireland IMAX movie.</li> <li>- Using <b>Golf influencers to tell the 'Golf and more' story</b>.</li> </ul>	<ul style="list-style-type: none"> <li>- PR content push with <b>increased sustainability messaging and a focus on experiences</b></li> <li>- Leverage <b>Greenways, Blueways and walking/hiking</b> as compelling reasons to choose the island of Ireland, and engage with nature, the environment and history</li> <li>- Promote <b>'12 months' message</b> throughout the year to offer monthly ideas to travel to the island of Ireland all year round.</li> </ul>

## Data-led decision making

Marketing technology (Martech) will continue to enhance data-led decision-making to optimise digital marketing performance and investment decisions throughout 2023. This will include essential preparations for cookie-less marketing, preparations for the retender of our media agency in 2024 by ensuring our Martech infrastructure is portable and completion of the global propensity model development.

## Northern Ireland

Northern Ireland is promoted as part of Tourism Ireland’s island of Ireland messaging. However in line with the remit to maximise Northern Ireland’s tourism potential a number of specific Northern Ireland initiatives are planned in 2023. These include:

- Continued promotion of **Northern Ireland Embrace a Giant Spirit (NI EAGS)**.
- Continue to highlight Northern Ireland’s **attractions, key cities and experiences**.
- **Promote specific passion points** where Northern Ireland has particular strengths including food and drink, golf and screen tourism. Use the hosting of **The Open** in 2025 to highlight and reinforce the message of world-class golf product available in Northern Ireland.
- Encourage and support Northern Ireland industry partners in maintaining their increased participation in Tourism Ireland’s **overseas marketing platforms**.
- Maintain and increase tour operator programming of Northern Ireland.
- Work with local councils and TNI to ensure **international tourism is embedded as a focus** in the development of all City/Region tourism projects.

### Northern Ireland around the world

GREAT BRITAIN	NORTH AMERICA AUSTRALIA & NZ	MAINLAND EUROPE
<ul style="list-style-type: none"> <li>- <b>Maximise opportunities around "B&amp;B by the sea"</b> BBC series.</li> <li>- Using the <b>Coach Tourism Association Conference</b> in Belfast as a platform for NI Industry and product.</li> <li>- <b>Build on momentum of Derry girls</b> and continue Derry~Londonderry &amp; Donegal campaign.</li> <li>- Invest in Scottish media partnership to drive deeper engagement of Northern Ireland (food/attractions/EAGS experiences/screen tourism etc).</li> <li>- Off-peak golf promotion featuring trophy and hidden gem courses.</li> </ul>	<ul style="list-style-type: none"> <li>- Leverage Belfast <b>UNESCO City of Music</b>.</li> <li>- Maximise <b>themes, experiences and passion points</b>; Game of Thrones Studio Tour, Halloween (Derry~Londonderry), Food and Drink.</li> <li>- Leverage promotion of return of <b>2025 Open Championship to Royal Portrush</b>.</li> <li>- Support the delivery of <b>Belfast Showcase USA</b> and the delivery of <b>Good Vibrations NY</b></li> <li>- Promote <b>ease of access from Dublin to Northern Ireland</b>.</li> </ul>	<ul style="list-style-type: none"> <li>- Promote increased <b>direct access</b> to Northern Ireland from Europe.</li> <li>- <b>Content push to drive story hooks</b> (Titanic, Game of Thrones Studio Tour, Causeway Coastal Route, Derry~Londonderry)</li> <li>- <b>Business development</b> - encouraging industry participation at targeted trade events and encouraging involvement in marketing opportunities partnership programme.</li> <li>- Promotion of the <b>2025 Open Championship</b> to re-enforce the message of world-class golf product.</li> </ul>

Northern Ireland will be showcased in Great Britain, France and the Netherlands with a dedicated jurisdictionally funded NI EAGS campaign.

## **Additional activity**

### **All island projects**

Tourism Ireland along with our stakeholders will support a variety of initiatives including:

- **Celebrations related to the 25<sup>th</sup> anniversary** of the Good Friday Agreement.
- Support the delivery of **Shared Island projects** with Fáilte Ireland (FI) and Tourism Northern Ireland (TNI).
- **Develop projects of scale to be submitted for Peace Plus funding** in collaboration with TNI, FI and departments.

### **Tourism policy/strategy**

At the time of writing, Ireland is developing its Tourism Policy and Northern Ireland its Tourism Strategy. This work will guide the direction of tourism across the island of Ireland.

The Department for the Economy published the 10x Economic Vision in May 2021, outlining an ambition for a decade of innovation that will provide economic, social and environmental benefits for all people in Northern Ireland.

Tourism Ireland will work with the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media in Ireland and the Department for Economy in Northern Ireland to support the development of these strategies and initiatives.

## 4. Sales facilitation

Tourism Ireland assists industry to complete the sale in a range of ways. This includes facilitating sales platforms and events overseas, helping industry go overseas on direct sales opportunities, delivering industry offers and referrals via Ireland.com and other channels, and cooperative campaigns with access carriers, trade partners and others.

### Industry Marketing Access Programme and co-operative marketing

As part of the RESTART phase of Tourism Ireland's COVID recovery response, the Industry Marketing Access Programme (IMAP) was developed. The initiative helped industry get out to market to undertake sales missions and promote the island of Ireland. During 2023, Tourism Ireland will continue with IMAP.

In addition, funds will be made available for specific co-operative partnerships with access providers and trade across the world – subject to the updated co-op guidelines set out in the Corporate Plan (promoting Northern Ireland, routes to the regions of Ireland and new routes).

### Events

Tourism Ireland runs overseas trade and consumer events, fairs and workshops around the world connecting island of Ireland industry with overseas trade. The event programme receives high praise from attendees evidenced by repeat participation and investment by industry partners. To increase the understanding of their value, during 2023 Tourism Ireland will undertake an independent evaluation of the top 20 fairs, workshops and events around the world. Learnings will be put in place in 2024 and beyond.

### Other sales facilitations

In addition to the events and help for industry, during 2023 Tourism Ireland will:

- Introduce a standardised **key account management programme** which will identify the most valuable trade for the island of Ireland around the world. This will include training for our teams.
- Expand the inclusion of **sustainable products** in trade familiarisation activity. Work to prioritise trade based on their ability to support the value adding tourism objectives (e.g. regional growth, shoulder season extension). This will begin in 2023 with a view to playing an increasingly important role in our trade relationships in future.
- Expand and manage the **industry offers** programme whereby Tourism Ireland promotes offers to our audiences via direct communications and Ireland.com.

## Sales facilitation around the world

GREAT BRITAIN	NORTH AMERICA AUSTRALIA & NZ	MAINLAND EUROPE
<ul style="list-style-type: none"> <li>- <b>Target repeat holidaymakers</b> - exploiting opportunities with air and sea carriers and online travel agency partners.</li> <li>- <b>Implement value-led initiatives with large Irish hotel groups</b> – providing targeted special offers in Oct-Nov, Jan-Mar.</li> <li>- <b>Partnership programme with Sojern</b> (travel intent data provider) to drive direct business for the industry.</li> </ul>	<ul style="list-style-type: none"> <li>- <b>Establish Shannon as the gateway to the Wild Atlantic Way;</b> work closely with Aer Lingus and United Airlines to promote existing flights and re-launch Chicago-Shannon.</li> <li>- <b>Expand network of platforms with luxury and sustainable product partners</b> to create stand-out sales facilitation opportunities with extended reach on the West Coast.</li> <li>- <b>Expand trade co-op to new partners focused on key passion points</b> including adventure/ activities and sustainability.</li> </ul>	<ul style="list-style-type: none"> <li>- <b>Integrated co-op campaigns</b> at key times to drive bookings and encourage greater season extension, regional growth and longer stays</li> <li>- <b>Co-op campaign with Galeria Reisen</b>, a travel agency chain with 120 best located stores across Germany.</li> <li>- <b>Harness opportunities around specific school group Tour Operator's</b> to expand their programmes to the island of Ireland, in support of shoulder season business.</li> </ul>



## 5. Supporting organisational excellence

It is essential that we underpin activity with an effective organisation. During 2023, Tourism Ireland will:

### Human resources

- Continue to **invest in our people**
- Continue to work on the organisations' **design and resources plan**
- Ensuring we operate in a **blended working environment**, taking advantage of the benefits of remote working while returning to the office as appropriate for collaboration and team building.
- Implement new management and leadership **development programmes**
- **Benchmark employee engagement survey** results against best in industry class
- Complete skills analysis of the Environmental, Social and Governance (ESG) capability in the organisation so as to address skills gaps
- Continue to **build performance capability** across teams
- Create a **diversity and inclusion plan** by end of 2023
- Implement **new Global Internship programme** and support markets and functions with recruitment needs
- Maintain **retirement planning**
- Continue to **enhance functionality of Talent** (the HR system used across the organisation)
- **Review employee contracts** in all jurisdictions

### Information communication technology

- **Invest in appropriate IT improvements** to ensure we can deliver the activity outlined while accommodating a blend of work-from-home and in-office working.
- Continued **move to the cloud** from on-premise
- Ongoing **security and GDPR work**
- **Business Continuity Plan** review and relaunch
- **Roll-out of PowerBI**

### Corporate communications

- Continue to **support the industry** by ensuring the reputation of inbound tourism is held firm across the island of Ireland and overseas and to keep the industry informed of our plans and activity throughout the year.
- Implement a **comprehensive, proactive programme of media, industry and stakeholder communications** in Ireland and Northern Ireland to highlight inbound tourism's contribution to economic growth and the importance of sustainability
- Launch the **new TourismIreland.com** corporate site
- Provide **briefings for ministerial visits** to markets / engagements and meetings and answer all FOI, PQs, AQs, day-to-day queries

### Finance

- Continue to provide support across the organisation for **effective procurement**
- Roll out **staff training** for various finance and procurement processes
- **Move Integra** (the finance system) to the cloud

## Strategy and insights

Support the strategic development of inbound tourism to the island of Ireland by working closely with stakeholders and through research and insight generation, where appropriate, shared with industry

Development of strategy:

- Continue to support the whole island of Ireland by **working with stakeholders** in both Ireland and Northern Ireland **on our shared objectives**.
- Continue to **support and influence government policy** and direction across all aspects of overseas tourism marketing.
- **Monitor overseas consumer opinions** towards holidays in the face of current and emerging global challenges such as COVID-19, cost of living and the war in Ukraine.
- Undertake an in-depth **assessment of Tourism Ireland's activity across Mainland Europe** to understand how best to target this important market to support the value-adding tourism objectives.

Research:

- An enhanced **brand-tracking and funnel performance programme** will be developed during 2023 to monitor opinions towards holidaying on the island of Ireland in key source markets.
- **Testing marketing content** when it's created, to ensure it is optimised to deliver on its objectives.
- **Research sustainability issues** in-market to understand how policy and marketing activities can best influence more sustainable holiday activity on the island of Ireland.

## 6. Investing wisely

The latest anticipated available budget for 2023, subject to further clarification/finalisation, is:

Investment	2022	2023
Operating Costs	€25.1m	€27.6m
Marketing Core	€61.4m	€43.6m
Capital	€7.0m	€7.0m
<b>Total</b>	<b>€93.5m</b>	<b>€78.2m</b>

Funding	2022	2023
TCAGSM	€79.9m	€63.3m
DfE	€13.6m	€14.9m
<b>Total</b>	<b>€93.5m</b>	<b>€78.2m</b>

### Planned investment by department and market area

CEEM	€4.9m	€5.1m
Marketing Communications (1)	€1.3m	€5.1m
Business Partnerships	€3.2m	€2.1m
Strategy & Insights/St Patrick's Day	€1.8m	€1.7m

North America	€14.9m	€12.3m
Great Britain	€15.4m	€12.3m
Mainland Europe	€17.7m	€6.8m
Australia and New Zealand	€900k	€900k
Emerging Markets and Global Inbound (3,4)	€1.3m	€650k

ICT and Data Protection	€1.6m	€1.6m
Corporate Services	€1.0m	€1.0m
Human Resources	€1.1m	€740k
Corporate and Industry Communications	€570k	€570k
Board Support	€190k	€209k
Finance	€253k	€205k
Northern Ireland Stakeholder Engagement	€157k	€160k

1 – Additional related investment: Publicis (ad agency) fees €1m, global St Patricks Day initiatives €200k

2 – Market investment will be allocated according to revenue generation potential

3 – Consumer marketing promotion in China, India and Japan will be deferred throughout 2023

4 – An assessment of opportunities within the Emerging Markets will guide activity lay-down in these markets and will feed into decisions on the possibility of establishing a 'global hub' to take advantage of specific opportunities of scale across the world

## 7. Monitoring the plan

The 2023 Business Plan has been developed in a period where significant risks and uncertainty are present across the industry. The related issues of are significant risks for 2023.

These risks, especially rising costs and the humanitarian use of tourist accommodation due to the war in Ukraine, result in difficulty setting targets.

The CPIs are set based on current conditions. It is noted that the current environment is one of extreme risk and this could impact on results.

### Economic

BPI 1 - Holidaymaker revenue for the island of Ireland in 2023 to be €3.2b/£2.8b (the equivalent of 83% of 2019 levels when accounting for inflation – Oct 22 inflation forecasts)

BPI 2 - Holidaymaker revenue for the Northern Ireland in 2023 to be £215m (the equivalent of 83% of 2019 levels when accounting for inflation – Oct 22 inflation forecasts)

BPI 3 - Deliver 9.2 million Net Usable Web Visits to Ireland.com to in 2023

BPI 4 - Drive word of mouth – Social EAV to be €20.6m/£17.7m in 2023

BPI 5 - Deliver at least 4.3 million commercial third-party digital referrals from Tourism Ireland run activity in 2023 to help close the sale

BPI 6 - Deliver 3.8 billion ‘Opportunities to see’ across all consumer marketing (excluding publicity) in 2023

### Social

BPI 7 – Ensure at least 60% of Tourism Ireland generated publicity coverage features a regional message

BPI 7A – Ensure at least 25% of Tourism Ireland generated publicity coverage features a non-peak message

### Environmental

BPI 8 - With Fáilte Ireland and Tourism Northern Ireland, agree a sustainable certification approach for island of Ireland industry by end of 2023

### Markets

BPI 9 – Holiday revenue for the island of Ireland from each of the top four markets (GB, US, DE, FR) in 2023 will be:

	Holidaymaker revenue	% of 2019 in real terms
GB	€574m/£499m	85%
US	€1,066/£927m	79%
DE	€311m/£271m	84%
FR	€157m/£136m	78%

Oct 22 inflation forecast

#### Note:

At the time of writing official tourism data and data on regional dispersal is unavailable and it is uncertain when this will become available, and whether it will be comparable to pre-pandemic data. Therefore a risk exists as to whether BPI1, BPI2 or BPI19 will be measurable.

## **Customer**

BPI 10 - New segmentation model, communications and implementation plan agreed by Board and implemented by end of the year

BPI 11 –Ensure 1.4 billion consumers reached through publicity coverage generated

BPI 12 – Ensure at least 85% of publicity coverage featuring key messages in 2023

BPI 12A –Ensure at least 33% of publicity coverage featuring Northern Ireland messages

## **Industry and trade**

BPI 13 – At least 1,000 discrete island of Ireland industry engaged in in-market activity by market by end of 2023

BPI 13A – At least 333 discrete Northern Ireland industry engaged in in-market activity by market by end of 2023

BPI 14 – At least 2,000 discrete opportunities to be taken up by industry partners by the end of 2023

BPI 15 – For 2023, an independent analysis of at least 20 fairs, workshops and events will be undertaken. A benchmark will be set in 2023 with respect to the SMART objectives for 2024 onward

BPI 16 – Global KAM model established, and all trade partners appropriately tiered by end Q3 2023

BPI 17 – Co-operative marketing achieves at least a 10:1 return on campaign investment

## **Organisational**

BPI 18 – Develop a new marketing effectiveness metric for 2024 activity

BPI 19 – Financial stewardship: no priority 1 audit findings and administer expenditure in line with +/- 1% variance threshold

BPI 20 – Achieve Great Places to Work accreditation in 2023

### **Note:**

The above operational measures cover activity in the top 12 markets.

## Appendix - A

### 2022 Business Plan – measurement indicators

#### Marketing effectiveness

<p>Welcome 7.0m tourists to the island of Ireland in 2022 (62% of 2019 levels)</p> <p>5.9m to Ireland (61% of 2019 levels)</p> <p>1.5m to Northern Ireland (68% of 2019 levels)</p>	<p>This data is currently unavailable. Based on an assessment of available data (eg CSO Arrivals, daa, CAA), it is anticipated around 75% of pre-pandemic tourists will visit the island of Ireland during 2022. Ahead of the targeted volume.</p>	
<p>Green Button campaign to have been seen by 80m potential visitors by end 2022</p>	<p>As at Q3'22 an estimated 309m consumers were reached with this campaign</p>	
<p>Develop a new marketing effectiveness metric, utilising our enhanced marketing technology capability, that can assess the impact of our communications at an individual consumer level – proposed model will be presented to the Tourism Ireland Board</p>	<p>Work on a new marketing effectiveness metric is still underway. The project relies on sufficient tourists been 'seen' on the island of Ireland (based on mobile phone records). It is expected this will be completed in early 2023.</p>	

#### Sales facilitation

<p>Deliver 2m commercial third-party digital referrals in 2022 to help industry close the sale</p>	<p>As at Q3'22 an estimated 5.9m commercial third-party digital referrals were made from Ireland.com</p>	
<p>Make industry offers available as part of the Green Button campaign from launch to end of 2022</p>	<p>By the end of Q3'22 there were over 2,500 industry offers available as part of the Green Button campaign</p>	

#### Preparing for REBUILD

<p>Present a redeveloped segmentation model to the Tourism Ireland Board for approval by end 2022</p>	<p>The development of a new segmentation is underway – the programme was delayed to enable consumer travel patterns to normalise post-Omicron. A new model is anticipated early 2023.</p>	
<p>Deliver the 2023-2025 Corporate Plan by end 2022 with sustainability at the heart of the plan</p>	<p>Completed.</p>	

#### Tourism Ireland the organisation

<p>Track Tourism Ireland's perception by industry and trade as being an effective collaborative partner</p>	<p>This activity was deferred due to the impact of the COVID pandemic on industry.</p>	
<p>The Tourism Ireland employer brand measurement achieves a top quartile performance as evidenced by a Staff Satisfaction rating of 80+%</p>	<p>A slightly different engagement measure was used based around trust. The trust score was 79%.</p>	
<p>Financial stewardship: no priority 1 audit findings and administer expenditure in line with +/- 1% variance threshold</p>	<p>No priority 1 items in the internal audit reports completed in the year to date and as at Q3 +/- 1% variance threshold is expected to be achieved</p>	

[Green – completed / Amber – on-going or changed / Red – incomplete / Grey – changed/n/a]

## Appendix – B

### Business Plan - Proposed 2023 Budget Allocation - In Euros 000's

North South Body	Approved Budget 2022			Proposed Change +/-			Proposed Budget 2023		
	Resource	Capital	Total	Resource	Capital	Total	Resource	Capital	Total
<i>€1 = 0.86GBP</i>									
Programme	61,318	7,040	68,358	(17,777)	0	(17,777)	43,541	7,040	50,581
<b>Total Programme Expenditure</b>	61,318	7,040	68,358	(17,777)	0	(17,777)	43,541	7,040	50,581
Pay Costs	14,400	0	14,400	1,566	0	1,566	15,966	0	15,966
Non Pay Administration Costs	9,900	0	9,900	900	0	900	10,800	0	10,800
<b>Total Admin Costs (excl. Pensions)</b>	24,300	0	24,300	2,466	0	2,466	26,766	0	26,766
<b>Total Programme &amp; Administration Expenditure, excl. Pension Costs</b>	85,618	7,040	92,658	(15,311)	0	(15,311)	70,307	7,040	77,347
<i>NI share representing 18%</i>	13,593	0	13,593	1,266	0	1,266	14,859	0	14,859
<i>IRL share representing 82%</i>	72,025	7,040	79,065	(16,577)	0	(16,577)	55,448	7,040	62,488
Pension costs – NI representing	291	0	291	0	0	0	291	0	291
Pension costs – IRL representing	800	0	800	0	0	0	800	0	800
<b>Overall Total Expenditure for approval</b>	86,709	7,040	93,749	(15,311)	0	(15,311)	71,398	7,040	78,438
<i>Total NI share, including pension costs</i>	13,884	0	13,884	1,266	0	1,266	15,150	0	15,150
<i>Total IRL share, including pension costs</i>	72,825	7,040	79,865	(16,577)	0	(16,577)	56,248	7,040	63,288
Existing/Projected Staff Numbers (FTE)	168			0			168		

Note, there is a €0.2m disconnect in the table above, from that in Section 6, as Pension costs – NI are not included in the Section 6 figures.



**Breakdown of Pension/benefit costs included in Business Plan- In Euros 000's**

	<b>NI</b>	<b>IRL</b>
Pension/benefit costs for N/S Body service*	291	800
Pension/benefit costs for service liability/ transferred in*	0	0
Pension/benefit costs already in payment and subsumed into the N/S Body*	0	0
Administration costs due to Pension Administrator	0	0
<b>Total costs of pensions/benefits included in Business Plan</b>	<b>291</b>	<b>800</b>

\*Please complete as applicable