

Tourism Ireland Corporate Plan 2023-25

Approved at 24 June 2024 NSMC.

Executive summary

Following the COVID-19 pandemic, inbound tourism to the island of Ireland is now on the road to recovery. During 2022, it is estimated that around 75% of the holidaymakers who would normally visit will have enjoyed a break on the island of Ireland. This represents a remarkable restart of inbound tourism since restrictions have lifted.

While inbound tourism has clearly restarted, continued recovery momentum is not guaranteed. There are significant and evolving risks which have the potential to inflict severe impacts on tourism in the near term.

Tourism Ireland has a recovery framework in place – RESTART, REBUILD, REDESIGN – and this Corporate Plan will focus on the REBUILD stage of this framework. This aims to rebuild the profitability of the industry through a focus on revenue generation.

As well as focusing on the economic sustainability of the industry, this Corporate Plan has social and environmental sustainability objectives at its core and form the strategic pillars of this plan. Through the plan, a focus on rebuilding regional revenue, extending the season, and encouraging businesses to deliver environmentally sustainable holidays will supplement the main revenue generation aims.

Reflecting this, the ambition of the plan is to:

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

This will be achieved by a range of promotional activities including significant marketing campaigns, publicity and programming, social media and digital marketing, and working with industry and trade overseas to facilitate sales.

To deliver the ambition and support the journey towards a sustainable future, Tourism Ireland's Corporate Plan defines the organisation's focus areas for the period 2023-2025.

- Supporting the development of the demand needed for **tourism businesses to achieve pre-pandemic levels of revenue (inflation adjusted)** by the end of the plan, thus providing profitability and security to communities
- Creating demand for **holidays across the island of Ireland** so that revenue is left in Northern Ireland and in the regions of the island of Ireland
- Creating demand for holidays not just during peak holiday times, but also in the **shoulder season to extend the benefit of inbound tourism**
- **Increasingly considering the environmental impact of inbound tourism**
 - o Considering the organisation's operations in some long-haul markets
 - o Working increasingly with businesses that are delivering more sustainable holiday experiences
 - o Supporting Tourism Ireland's sister agencies and government in sustainable tourism initiatives
- **Developing a new consumer campaign to support the REBUILD ambitions**, focusing on the island of Ireland's differentiators as a holiday destination, communicated through celebrities and visitors
- Establishing a **three-year TV programming fund** to take advantage of bigger, more impactful opportunities that take time to develop
- Increasing representation of **holidaymaker diversity** on the island of Ireland through external messaging

In addition, the overseas promotion of Business Tourism (excluding association conferences) to the island of Ireland will be included within Tourism Ireland's remit.

Addressing the changing environment, Tourism Ireland will remain flexible throughout the plan to adapt as risks and opportunities arise.

Contents

- 1. Introduction 1
- 2. Looking forward..... 4
- 3. Tourism Ireland’s strategic response 6
- 4. Northern Ireland 10
- 5. Corporate Plan priorities 2023-2025 11
- 6. Operating plan allocation 2023-2025 (Budget allocation)..... 20
- 7. Monitoring and evaluating implementation 21
- 8. Conclusion 23
- Appendices 24

Tourism Ireland would like to thank our stakeholders for their involvement in the development of this Corporate Plan, this included industry and trade from around the world and across the island of Ireland as well as government stakeholders and the Tourism Ireland team.

1. Introduction

International tourism is on the road to recovery following the COVID-19 pandemic. The fundamental desire to travel remains strong – pent-up demand and the ‘revenge travel’ phenomenon saw an estimated 75% of 2019 levels of inbound holidaymakers enjoy a break on the island of Ireland in the 2022 year to date.

This successful restart provided much-needed international tourists across the island of Ireland bringing the inbound industry back to life. Despite the much better than expected performance of inbound tourism, it is still expected to fall c.25% short of pre-pandemic levels – a likely deficit to the economies on the island of Ireland of c.€850m/£731m in holidaymaker revenue.

Tourism Ireland was established as one of the “six areas of cooperation” under the framework of the Belfast Agreement of Good Friday 1998. The agency operates under the auspices of the North/South Ministerial Council through the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media in Ireland and the Department for the Economy in Northern Ireland. Tourism Ireland is responsible for marketing the island of Ireland overseas. Its mandate is to increase tourism to the island of Ireland and to support Northern Ireland to realise its tourism potential.

As Tourism Ireland transitions into the next Corporate Plan period, there is optimism for the long-term health of inbound tourism, however, uncertainty remains in the short-term as the task of recovery is not yet complete. The Corporate Plan period is expected to be dominated by ever-changing, significant risks (such as the conflict in Ukraine and cost of living implications). Tourism Ireland will play its part in ensuring demand recovery continues and the industry returns to profitability.

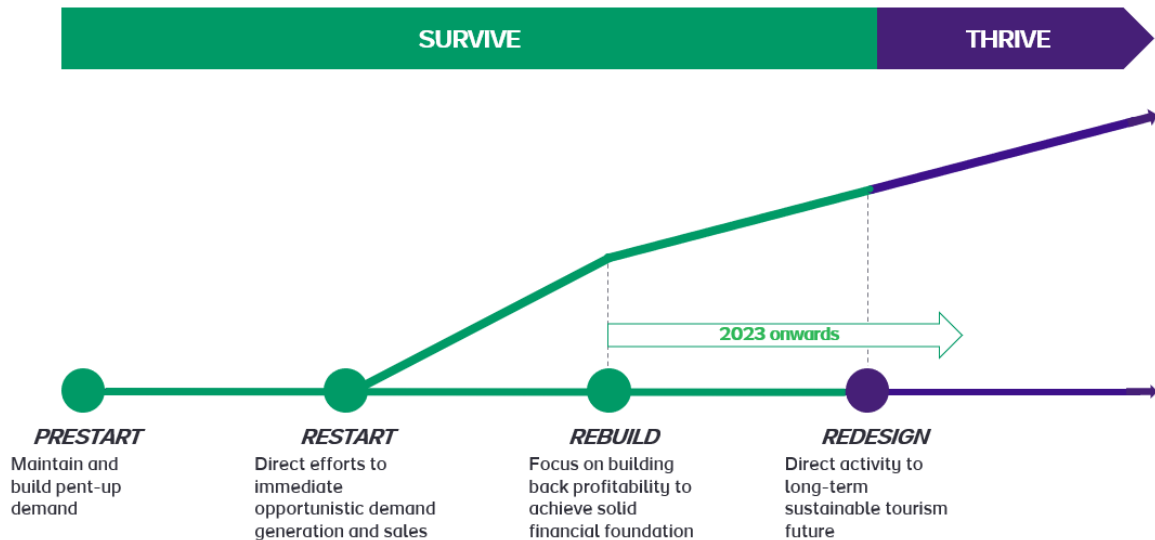
It is also vital Tourism Ireland is ready to play its role in achieving a long-term sustainable tourism industry. Actions taken during this Corporate Plan period will make a real impact on economic, social, and environmental sustainability during the next three years, and lay the foundations for a thriving sustainable future. By taking actions over the lifetime of this plan, Tourism Ireland will help to add value to the economy and communities while minimising any negative impact on the environment.

The Corporate Plan sets out a framework to REBUILD tourism over the next three years with an ambition to:

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

Tourism Ireland's COVID-19 recovery plan

In response to COVID-19, Tourism Ireland developed a multi-year recovery framework. The framework sets out how Tourism Ireland can support the industry to survive the crisis and ultimately to thrive into the future. This framework was composed primarily of RESTART, REBUILD, and REDESIGN phases.



During the depths of the pandemic, Tourism Ireland was focused on maintaining the island of Ireland in the minds of prospective holidaymakers, helping to build pent-up demand which has been clearly seen during 2022 (PRESTART).

Once leisure travel recommenced, the RESTART phase began. Additional investment was provided, and Tourism Ireland was able to market the island of Ireland across the world. A specific 'Green Button' campaign was deployed to great success. Research conducted in April 2022 identified that 29% of outbound holidaymakers in the island of Ireland's top four source markets recalled seeing/reading or hearing advertising about Ireland and/or Northern Ireland.

While the organisation will remain flexible to adapt to evolving conditions, 2023-2025 is expected to be a period of REBUILD, with emphasis moving from pure demand generation to value generation – building back revenue and profitability to ensure the industry is ready to thrive into the future.

Following the REBUILD phase of the recovery plan, the REDESIGN phase will focus on delivering a sustainable tourism future over the long term for the island of Ireland.

The framework was the basis of an addendum to the draft Corporate Plan 2020-2022. This addendum contained several plan measurements (targets), however, the evolving nature of the pandemic meant they were of limited use. The plan measurements are included in an appendix to this plan along with the achievement against each measure.

2020-2022 Corporate Plan delivery

The COVID-19 pandemic brought international tourism to a stop. The tourism industry across the island of Ireland faced a battle for survival like it has never seen before; healthy businesses were forced to close with some never to re-open, whilst others were dealing with varying restrictions and critically low demand.

On the back of a record 2018 and 2019 for inbound tourism to both Ireland and Northern Ireland, Tourism Ireland developed a Corporate Plan to guide activity to 2022. Before the plan could be finalised, COVID-19 hit and required a complete reprioritisation to help the industry survive.

11.3m visitors arrived into Dublin airport in 2019. With arrivals falling to less than 1% of normal visitor numbers during the peak of the pandemic, Tourism Ireland's priorities changed overnight. Following an initial period of ensuring that our teams, industry, and trade around the world were safe, a revised set of priorities were developed.

Four essential pillars of action have been identified: consumer motivation, access, industry, and trade sales facilitation, and working towards a sustainable future. These were outlined in an addendum to the original corporate plan.

Targets were also reset, however, the ever-changing environment meant even these revised metrics quickly became inappropriate. Tourism Ireland adapted as a result, providing the industry and overseas trade with information, reassurance and guidance while ensuring that the island of Ireland remained visible in the minds of holidaymakers.

Tourism Ireland tracked consumer motivations throughout the pandemic. This included feedback from market colleagues around the world and an extensive research programme – the COVID Tracker. Comfort with taking overseas holidays fell dramatically with the height of the pandemic seeing only 17% of holidaymakers from Great Britain being comfortable taking a European break.

Tourism recovery working groups were established by both the government of Ireland and the Northern Ireland Executive. Tourism Ireland played a key role in these groups as well as a range of industry recovery groups.

Consumer campaigns ran at varying levels throughout the period, including campaigns aimed at encouraging people to dream of travel to the island, through to travel now messaging with the aid of a specific Green Button campaign.

Official statistics were paused during the pandemic, and at the time of writing tourism volume and value data is unavailable for 2020-2022. Estimates however, indicate that in 2022 at the end of the plan period the island of Ireland will have welcomed around 75% of the holidaymaker's seen pre-pandemic.

The targets set out in the 2020-22 Corporate Plan were largely superseded, however a summary of performance against these is included in an appendix to this document.

2. Looking forward

It is difficult to predict levels of demand for holidays over the next three years. There are many opportunities and risks which make forecasting in the short-term very difficult. This creates the need for a flexible and agile approach taken over recent years to continue throughout the life of this plan.

Opportunities	Risks
<p>Strong brand position held by the island of Ireland overseas</p> <p>Good air and sea connectivity and capacity to the island of Ireland, as long as demand exists to meet capacity</p> <p>Tourism Ireland’s investment in marketing technology enables the organisation to reach ‘warm leads’ amongst holidaymakers primed to visit the island of Ireland</p> <p>The island of Ireland product is second to none, with a strong and collaborative industry including sister agencies Fáilte Ireland and Tourism Northern Ireland</p> <p>Significant sporting and festival events are planned, encouraging direct holidays and presenting the varied world-class experiences of the island of Ireland to the world</p>	<p>Inflation</p> <ul style="list-style-type: none"> • Cost of living increases resulting in lower disposable household income in source markets • High fuel costs for airlines and sea carriers • Increased costs resulting in higher prices of holiday experiences and reduced competitiveness compared to other European countries • Recessionary fears may reduce household spending on tourism • High media cost inflation expected to be in the region of 10% p.a. during the lifetime of this plan. This factor is also exasperated by exchange rates • Real-term investment reductions in investment in overseas marketing will result in limitations of demand generation activity across markets <p>Limitations to the availability of holiday accommodation stock, due to necessary housing of refugees particularly related to the conflict in Ukraine</p> <p>Brexit/EU Exit – including proposed Electronic Travel Authorisation for visitors to the UK which may result in a drag to Northern Ireland holidaymaker recovery</p> <p>COVID-19 has the potential to resurge, and other health issues may emerge</p> <p>Environmental considerations reducing holidaymaker travel demand including flight shaming</p> <p>Labour shortages may pervade throughout the lifetime of the Corporate Plan and could potentially impact the experience of holidaymakers</p>

While the next three years are difficult to predict, longer-term growth is anticipated for international tourism, including to the island of Ireland. Current forecasts suggest by 2030, the island of Ireland will welcome an additional c.1.2m/22% of holidaymakers compared to 2019. This additional holidaymaker volume, if realised, would create demand management challenges.

Sustainability

Tourism Ireland recognises the UNWTO (United Nations World Tourism Organisation) definition of sustainable tourism:

“Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities”.

As such, three key areas of sustainability have been identified as core pillars and have shaped the thinking of this Corporate Plan:

- Economic – the contribution inbound tourism can make to economic prosperity and in particular jobs and livelihoods
- Social – the benefit that communities experience from inbound tourism including jobs right across the island of Ireland but also benefits such as support for cultural activities
- Environmental – the impact of tourism on the environment

The long-term ambition is to achieve a balance across all three pillars. It is important to acknowledge that while inflation adjusted revenue is the initial priority, the weight of each pillar will vary over time.

Tourism Ireland is working with Fáilte Ireland, Tourism Northern Ireland, and the government departments on various initiatives to encourage and develop a sustainable future for the industry. This collaboration and alignment is vital to long-term success and the establishment of best practice. Tourism Irelands work includes undertaking consumer research in major source markets to understand the views and behaviours around sustainability and holiday destination choice. Tourism Ireland has also considered the relative emissions created by tourism and in particular the emissions from accessing the island of Ireland from different markets. The findings from this research and emissions analysis have helped build the strategy outlined in this plan as well as supporting the sustainability agenda across the island of Ireland.

Tourism Ireland’s Corporate Plan has also considered the ambitions of the governments of Ireland and Northern Ireland relating to the United Nations’ Sustainable Development Goals (SDGs). In Ireland, the government has adopted a ‘whole-of- Government’ approach, which means that every Government Department has a role in implementing the goals, together with state agencies and local authorities. The SDGs considered to be of primary importance to the tourism industry include:

- | | |
|--|--|
| • Decent work and economic growth | • Responsible consumption and production |
| • Industry, innovation, and infrastructure | • Climate action |
| • Sustainable cities and communities | • Life on land |
| | • Partnerships for the goals |

The Northern Ireland government department responsible for tourism policy - Department for Economy – has an economic vision based on the statutory obligations set out in the Climate Change Act (NI) 2022. More specifically, with regards to Tourism, the Department is currently developing a Tourism Strategy which will have sustainability at its core.

In line with this, Tourism Ireland’s Corporate Plan will support the governments to achieve their ambitions relating to sustainability.

3. Tourism Ireland's strategic response

Considering the opportunities and risks over the lifetime of this plan, as well as the guiding principles of the organisation itself, Tourism Ireland's Corporate Plan sets the direction for the organisation's focus over the period 2023-2025.

The Corporate Plan fully considers Tourism Ireland's key organisational statements. The organisation will continue to work within its mandate to *"increase tourism to the island of Ireland, and to support Northern Ireland to realise its tourism potential"*. The organisation's purpose, developed for the previous Corporate Plan, maintains its importance for the organisation and remains for this Corporate Plan period – *"through tourism, enable communities to prosper, improving quality of life throughout the island of Ireland"*.

During 2021, Tourism Ireland's Board convened to consider the long-term vision for the organisation, resulting in Vision 2030. Vision 2030 sets out an aspiration for Tourism Ireland as *"creating a place where sustainable tourism thrives"*.

Addressing the mandate, purpose, and vision 2030 is complex and it requires Tourism Ireland to support demand creation which results in:

- Holidaymaker revenue growth
- Northern Ireland holidaymaker revenue growth
- Regional holidaymaker revenue growth
- Extension to the holiday season
- Greater focus on and minimisation of the environmental impacts of inbound tourism
- Tourism behaviours that enable communities to prosper

Considering this desired demand generation, a set of design principles were defined to act as guardrails for the strategy development process:

1. Increase tourism revenue from inbound tourism for the island of Ireland
2. Drive growth in Northern Ireland and the regions
3. Increase tourism in the shoulder season
4. Promote inbound tourism that is environmentally sustainable

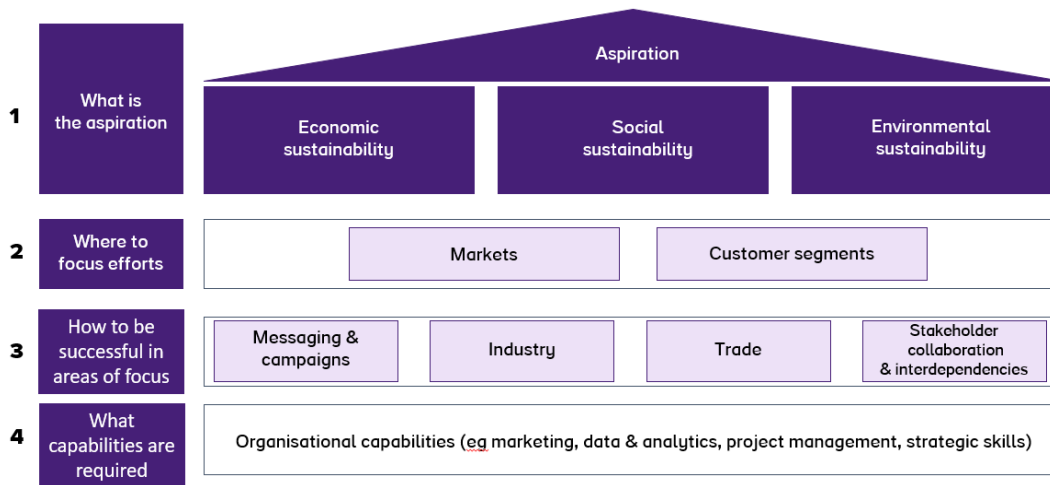
Tourism Ireland's strategy house

The Corporate Plan 2023-2025 has been built around a structured strategic framework – the Tourism Ireland Strategy House.

The Strategy House sets out to address a set of key strategic questions at the corporate level, including:

1. What is Tourism Ireland's aspiration and strategic objectives?
2. Where should Tourism Ireland focus its efforts in terms of markets and customer segments?
3. How can the organisation be successful in its chosen focus areas (e.g., messaging, industry, trade, stakeholder collaboration)?
4. What capabilities does the organisation need to build to achieve its ambitions?

The strategy house is centered around the three strategic pillars of sustainability: economic, social, and environmental sustainability.



Building the Strategy House around the three sustainability pillars signals a shift towards sustainable tourism, in line with the anticipated direction of government policy in Ireland and Northern Ireland.

To support economic sustainability, Tourism Ireland will conduct demand generation activity with a focus on achieving pre-pandemic revenue levels (accounting for inflation).

To support social sustainability, Tourism Ireland will place increasing focus on generating demand which delivers:

- Balanced regional growth, ensuring holidaymaker revenue increases in the regions of the island of Ireland and Northern Ireland
- Holidaymaker revenue growth in the shoulder season
- A return to profitability for businesses; ultimately securing employment across the island of Ireland

To support environmental sustainability, Tourism Ireland will increasingly consider the environmental impact of tourism both in terms of accessing the island of Ireland and related to activities on the ground in the decisions it takes moving forwards.

The relative focus Tourism Ireland places on these three pillars is expected to change over the course of the plan, with social and environmental pillars growing in importance as the REBUILD phase successfully returns the industry to profitability. The organisation will maintain the flexibility needed to adapt to market changes throughout the course of this plan, specifically through its annual business planning process.

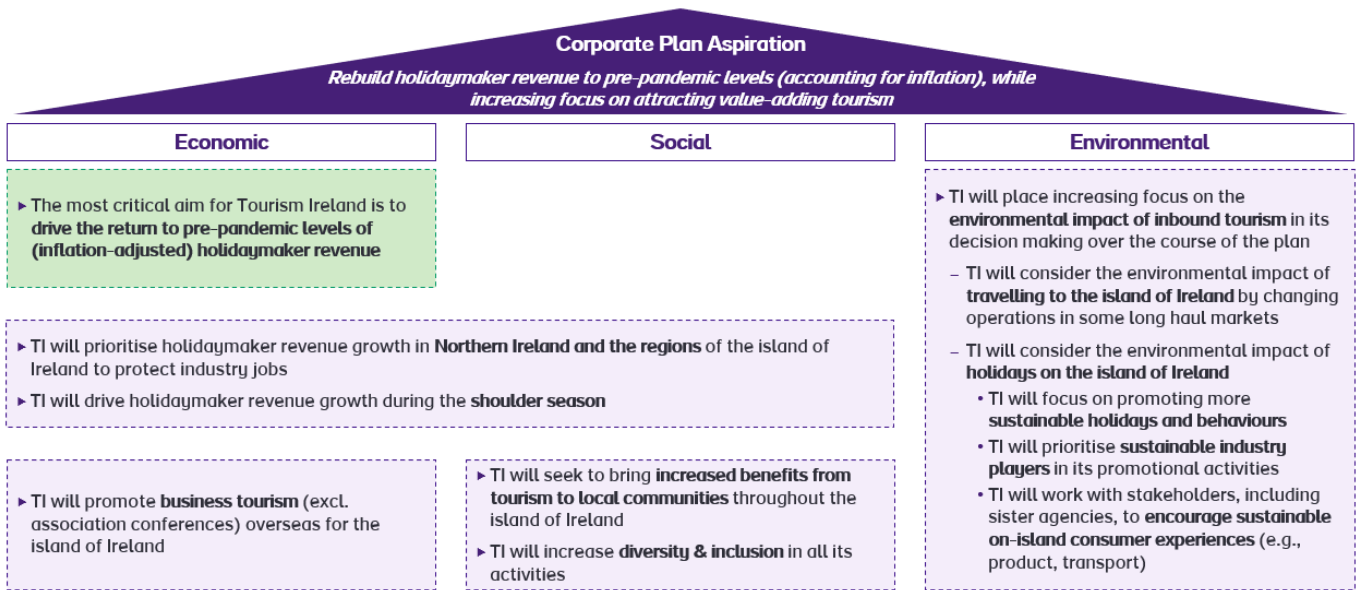
Tourism Ireland strategic objectives



Tourism Ireland’s strategic objectives for the Corporate Plan 2023-2025 are defined across the three strategic pillars. The objectives support the overarching aspiration:

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

The objectives will act as guidelines when deciding how to focus activities over the lifetime of this Corporate Plan.



The most critical strategic objective for Tourism Ireland during the 2023-25 plan is defined in the economic pillar, which is to create the demand required to achieve pre-pandemic levels of holidaymaker revenue (inflation-adjusted). This strategic objective is focused on ensuring the economic viability of the industry, which is central to the REBUILD phase of the organisation’s COVID-19 recovery plan.

Spanning the economic and social pillars, there are two additional objectives related to driving holidaymaker revenue in the Wild Atlantic Way (WAW), Ireland’s Ancient East (IAE), Ireland’s Hidden Heartlands (IHH) and Northern Ireland and driving holidaymaker revenue in the shoulder season. These two objectives are key to supporting the industry to offer high-quality jobs across the island of Ireland.

Lastly, within the economic pillar, there is an objective relating to the promotion of business tourism overseas. Tourism Ireland’s remit in this area is to be defined at the start of the Corporate Plan.

In the social pillar, there are two additional strategic objectives. The first relates to increasing the benefits of inbound tourism to local communities, which is important for one of the emerging themes from the organisation’s guiding statements - to enable communities to prosper. Secondly, an objective has been set relating to the increase of Diversity and Inclusion in Tourism Ireland’s activities, including its external consumer and corporate messaging.

Finally, the environmental pillar contains strategic objectives relating both to the environmental impact of travelling to the island of Ireland, and the environmental impact of holidaymakers while on the island. Regarding travel to the island of Ireland, several changes will be made relating to some long-haul markets. Considering “on-the-ground sustainability”, which relates to the environmental impact of holidaymakers during their stay on the island of Ireland, Tourism Ireland has outlined three strategic objectives. These include:

- Promoting sustainable holidays and behaviours in external messaging
- Prioritising sustainable industry players in promotional activities
- Working alongside stakeholders (e.g., sister agencies) to be an advocate for sustainable island of Ireland consumer experiences (e.g., the development of sustainable product, improved transportation)

Attracting holidaymakers that bring value-adding tourism to the island of Ireland

To achieve Tourism Ireland’s strategic objectives, several “value-adding tourism” traits have been identified. Encouraging value-adding tourism to and on the island of Ireland will help Tourism Ireland to achieve its strategic priorities across all three pillars of sustainability. While ensuring the commercial viability of the industry is important in the short term, there will be an increasing focus on attracting holidaymakers that demonstrate these traits.

1. Higher spending in Northern Ireland and the regions of Ireland
2. Higher spending during the shoulder season
3. Makes a positive impact on communities
4. Stays for longer
5. Higher spending overall during the course of their stay
6. Considers their environmental impact
7. Helps preserve the natural environment

4. Northern Ireland

Tourism Ireland will continue to highlight new attractions, key cities, and experiences in Northern Ireland. Regional growth, and balance regional distribution, is of critical importance to Northern Ireland for the period of this Corporate Plan.

Due to the volume of short trips to Northern Ireland, and especially to attractions such as the Giant's Causeway, increasing the length of stay of holidaymakers is important for Northern Ireland.

Northern Ireland's tourism industry is heavily dependent on the visiting friends and relatives (VFR) visitor segment. Tourism Ireland will enable Northern Ireland to grow its holidaymaker revenue.

- *Northern Ireland: Embrace a Giant Spirit*

Tourism Ireland will continue to promote Embrace a Giant Spirit as an integral part of Northern Ireland's proposition. Where feasible, it will also better integrate Embrace a Giant Spirit with the experience brands in Ireland to promote a more comprehensive message that will benefit border regions.

- *Build on the legacy of Game of Thrones and The Open*

The organisation will capitalise on the tourism legacy of cultural events (e.g., Game of Thrones, major sporting events) to support the promotion of attractions and facilities as they are developed. Tourism Ireland will use the hosting of The Open to reinforce the message of the world-class golf product available in Northern Ireland.

- *Drive publicity to give Northern Ireland unique standout*

Tourism Ireland will promote specific passion points where Northern Ireland has particular strengths (e.g., food and drink, golf, screen tourism, genealogy). These will be used to provide positive publicity and create immediacy around visiting Northern Ireland and encourage regional spread.

- *Access*

Tourism Ireland will continue to encourage direct access to Northern Ireland through cooperative marketing with carriers (please refer to the facilitating the sale section for updated guidelines around funding). Jurisdictionally funded cooperative marketing on a targeted basis will also be undertaken as agreed between the Department and Tourism Ireland.

As well as encouraging increased access direct to Northern Ireland, we will continue to promote the ease of access from Dublin to Northern Ireland from long-haul markets. Tourism Ireland will work with sea carriers in Great Britain to promote car touring in Northern Ireland.

- *Trade and industry engagement*

Tourism Ireland will encourage industry partners to participate in Tourism Ireland's overseas marketing platforms to represent Northern Ireland. Tourism Ireland will seek to restore and increase tour operator programming of Northern Ireland and to collaborate with Tourism Northern Ireland to increase the number of FAM trips facilitating more agents to experience the Northern Ireland product.

- *Working with stakeholders*

Tourism Ireland will seek opportunities to influence City and Region Deal from the UK government for the benefit of tourism. These are anticipated to fund several significant projects over the period of this Corporate Plan and deliver new tourism product in the country.

5. Corporate Plan priorities 2023-2025

The priorities listed in this section of the Corporate Plan relate to questions two and three of the strategy house, which act as the base on which Tourism Ireland will deliver its strategic objectives.

Markets and segmentation

Market prioritisation

Tourism Ireland's market strategy is based on maximising the return on its investment using its finite budget, delivering the organisation's strategic objectives, and considering the potential impact of its operations in certain markets on the strategic objectives of its stakeholders.

As part of the REBUILD strategy, Tourism Ireland's market investment will be weighted towards markets that deliver the greatest revenue, and in particular the greatest profitable revenue to the tourism industry. Specific market investment levels will be determined in each year's business plan, however, it is likely that markets such as the United States will receive additional investment in order to maximise the return to profitability as soon as possible.

During the plan Tourism Ireland will conduct an assessment of Mainland Europe. This will determine the best way to attract value adding tourism and the most effective way to create demand across this important market area.

In order to address the environmental objectives inherent in this plan, Tourism Ireland will reconsider its operations in some further away markets. Consideration has been given to a range of assessment criteria relating to the strategic objectives. Three market groups emerged as requiring further consideration:

Emerging markets (China, India, Japan)

The emerging markets contributed 1.3% of the total holidaymaker revenue in 2019 at €46m, while accounting for 2.3% of the total CO₂ emissions in 2019 at 163mkg. Despite a high average spend of €933 per day in 2019, emerging market holidaymakers had one of the highest emissions per euro spent (3.6kg/€). This is compared to closer to home markets such as France and Germany (0.8kg/€ each) and GB (0.7kg/€). Tourism Ireland will take the following actions specific to emerging markets:

- Marketing spend in China, India, and Japan will be deferred until end of this Corporate Plan
- Following this Corporate Plan period, the need for marketing spend in these markets would be reassessed

Middle East

The Middle East market contributed €13m of holidaymaker revenue in 2019, which was 0.4% of total holidaymaker revenue. It contributed 29mkg in CO₂ emissions in 2019, which accounted for 0.4% of total emissions. Despite a high average spend of €1,005 per day in 2019, holidaymakers from the Middle East had one of the highest emissions per euro spent (2.3kg/€). Tourism Ireland will take the following actions specific to Middle East:

- A decision on the Middle East market will be made following the completion of the parallel Emerging Markets Assessment project in late 2023 and in light of emerging government policy direction

Australia & New Zealand

The Australia & New Zealand (ANZ) market accounted for €129m of holidaymaker revenue and €104m of visiting friends and relatives (VFR) revenue on the island of Ireland in 2019.

Holidaymakers from ANZ had a high average spend of €913 per day and stayed longer than holidaymakers from closer to home markets, with an average length of stay of ten days. VFR contributed ~42% of the total visitor revenue on the back of a strong diaspora community in ANZ. While the ANZ market had a high revenue contribution and has a strong diaspora community, it also had the highest emissions per euro spent (7.7kg/€) in 2019, which is primarily due to the long distance between ANZ and the island of Ireland.

- Tourism Ireland will make a decision on its future operations in the ANZ market once Ireland's tourism policy and Northern Ireland's tourism strategy is defined.

Global hub

Tourism Ireland will examine the possibility of establishing a “global hub”, focused on markets outside Europe and North America, as a means of consolidating resources while maintaining the operational capacity needed to capitalise on opportunities.

Customer segmentation strategy

In order to target the best prospect holidaymakers in Tourism Ireland's source markets, the organisation has an established overseas customer segmentation model. The model was developed almost ten years ago and due to an evolved travel landscape, it is now ready to be replaced.

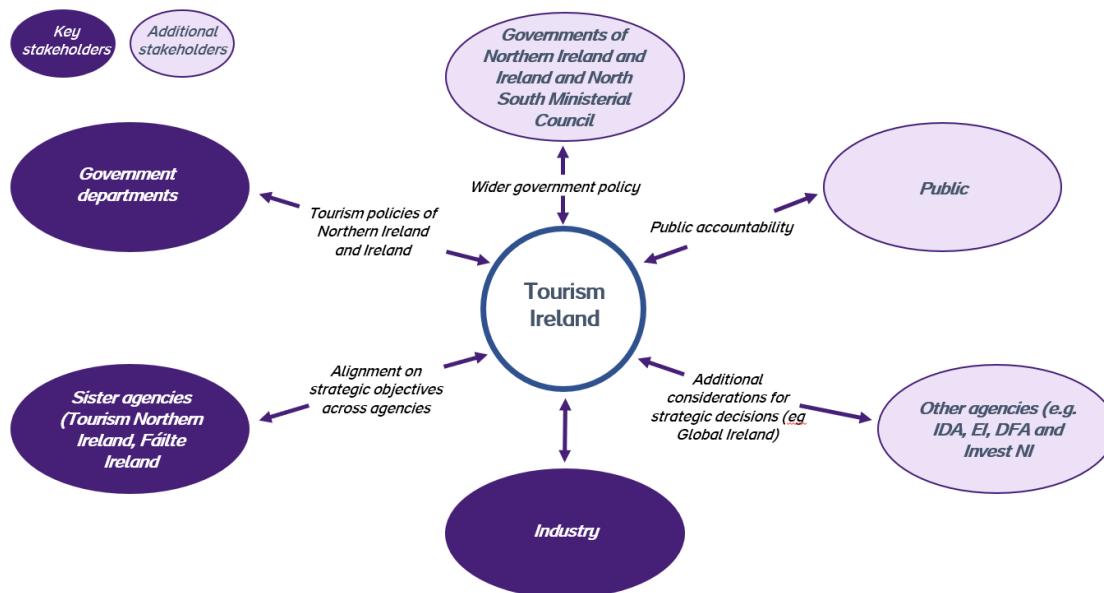
A significant research programme is underway during 2022 and early 2023 to assess consumer behaviour, attitudes, and needs from holidays and to determine the most appropriate segments for Tourism Ireland to target. Target segments will be determined in full consideration of this Corporate Plan's strategic objectives.

Tourism Ireland aims to deliver the updated customer segmentation strategy in early 2023. The new customer segmentation will be communicated across the organisation and industry and embedded in all of Tourism Ireland's activity by the end of this Corporate Plan period.

Stakeholder collaboration

Effective collaboration with key stakeholders and partners across the island of Ireland is critical to Tourism Ireland's success. Tourism Ireland is committed to continuing to strengthen these relationships over the course of this plan.

Tourism Ireland's ecosystem is widespread, including:



Tourism Ireland operates in the broader tourism ecosystem. In order to deliver its strategic objectives, Tourism Ireland's strategy needs to be aligned with the policies of the governments of Ireland and Northern Ireland, and the strategies of Fáilte Ireland and Tourism Northern Ireland.

Tourism Ireland, Fáilte Ireland and Tourism Northern Ireland work very closely to support the tourism industry across the island of Ireland. Tourism Ireland will collaborate with these sister agencies to deliver a more sustainable on-island consumer experience, including encouraging the development of sustainable product and encouraging responsible tourism that benefits communities.

Tourism Ireland will use its role as a strong voice of the overseas consumer to provide the industry with market and holidaymaker insights. The organisation will continue to carry out activities to understand the expectations and changing behaviours of overseas holidaymakers over this Corporate Plan period (e.g., report on importance of sustainability to consumers) and identify risks the industry is facing (e.g., accommodation availability). It will communicate key findings with its stakeholders.

Tourism Ireland will work with the government departments in Ireland, the Northern Ireland Executive and the Northern Ireland Bureau to support the delivery of Ireland's Global Footprint, Northern Ireland's global initiatives and international island of Ireland opportunities. In addition, the organisation will continue to work with government stakeholders to address island of Ireland issues stemming from differences between the countries that affect the industry (e.g., Electronic Travel Advisory requirement for non-Irish/UK citizens to visit the UK, extending regional brands across the border, cross-border sporting events).

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. This broadly aligns with the approach outlined in this plan and where appropriate, activity be aligned with the 10X ambitions.

Corporate Plan programme

Marketing activity

Tourism Ireland carries out activities designed to inspire and motivate overseas consumers to choose the island of Ireland as a holiday destination. Marketing activity for this Corporate Plan period has been specifically designed to support the REBUILD agenda with a view to increasing focus on social and environmental sustainability as the plan progresses.

Main campaign

Tourism Ireland's main marketing activity will focus on achieving REBUILD targets. The messaging relating to this main activity will be on an island of Ireland basis and will centre on the 'Why Ireland' message, which will be both emotionally engaging and competitively differentiating.

In recognition of the greater knowledge amongst holidaymakers in Great Britain about the island of Ireland, flexibility will be built into the annual business plan process. This would enable Great Britain to utilise the most appropriate messaging to convert business as market conditions evolve for example with a focus on NI Embrace a Giant Spirit (EAGS) and experience brand messaging (subject to sufficient funds being available).

Supporting campaigns

Tourism Ireland's main campaign will be enhanced by supporting activity aimed at attracting value adding tourism, and will focus on attracting holidaymakers that:

- Spend more in Northern Ireland and the regions
- Spend more during the shoulder season
- Make a positive impact on communities
- Stay for longer
- Spend more overall during the course of their stay
- Consider their environmental impact
- Help preserve the natural environment

Tourism Ireland will ensure that messaging appropriately and increasingly reflects the diverse and ever-changing variety of visitors to the island of Ireland.

Significant sporting events are likely to play a part in supporting campaigns e.g., the Aer Lingus College Football Series of Notre Dame v Navy, and The Open leading up to Ryder Cup.

NI EAGS & Experience brand campaigns

NI EAGS and the experience brands across Ireland will continue to feature across Tourism Ireland's communications. Dedicated experience brand campaigns will be done through dedicated jurisdictional funding.



In Great Britain, there is potential to leverage core funds for NI EAGS and experience brand-specific campaigns. Decisions relating to this will be made on a flexible basis over the course of this Corporate Plan as market conditions evolve.



The five experience brands: Embrace a Giant Spirit (EAGS), Ireland's Hidden Heartlands, Ireland's Ancient East, Wild Atlantic Way, and Dublin, will continue to be promoted overseas.



Digital and social media

There will be a shift to a greater focus on strategic content planning for digital channels. This will include for example a shift from “scenery” to “experiences” in digital messaging. The digital and social channels will be important for delivering Length of Stay messaging.

A social strategy has been newly developed by Tourism Ireland, which is centred around amplification. Additionally, the “test and learn” approach adopted as part of the social media strategy will be maintained throughout the lifetime of this Corporate Plan.

Influencer activity will be better integrated into the wider marketing approach, and a process to better measure their impact will be put in place during this Corporate Plan period.

A propensity model to assess the impact of Tourism Ireland’s communications on holidaymakers’ intention to visit is being developed, with a pilot being run in 2022 to determine its effectiveness. If successful, this model will be the basis of future digital investments.

Publicity, PR, and TV Programming

Tourism Ireland’s global messaging reaches prospective holidaymakers through a multitude of channels including for example publicity, TV programming, digital and social media, and sponsorship.

Publicity is an important element of Tourism Ireland’s marketing activity, providing relatively low cost and significantly influential engagement with wide audiences. Tourism Ireland’s teams across the world provide local connection, building relationships and taking advantage of local conditions to create a ‘buzz’ with new news for the island of Ireland throughout the year. In addition to traditional publicity opportunities such as media visits, teams increasingly work with influencers to bring an authentic travel experience to consumers.

This area of our work is particularly important in building demand for value added tourism, especially in light of the continued media inflation pressures on advertising.

PR strategy

A dedicated PR strategy will be developed to complement the organisation’s existing strengths in developing local market media relationships, market specific messaging and nuance. The global strategy will ensure Tourism Ireland takes a coherent approach to a fragmenting and changing media landscape. A global strategy will allow Tourism Ireland to strengthen its relationships with global syndicated press agencies.

Publicity and social messaging

Publicity and social media are seen as key channels for Tourism Ireland to communicate its messaging directed at attracting value-adding tourism. These channels will be important for communicating regional reasons to travel to drive regional growth. They will also be a key medium for Tourism Ireland to deliver messaging that highlights sustainability. Over the course of the Corporate Plan period, there will be an increasing amount of Publicity content aimed at value-adding tourism.

Three-Year TV Programming strategy

Tourism Ireland dedicates funding to TV programming to support the production of programmes that feature the island of Ireland for broadcast overseas.

A 3-year TV Programming strategy and budget will be established for the lifetime of the Corporate Plan to enable more strategic decision-making and longer-term projects in relation to TV programming.

Facilitating the sale

Tourism Ireland works alongside its sister agencies to enable industry and trade to generate sales. Tourism Ireland brings together industry with trade and consumers to facilitate the sales process.

Tourism Ireland will actively facilitate industry sales, for example through:

- Co-operative marketing with partners
- Sales missions in overseas markets
- Access to overseas trade platforms and proprietary events
- Industry showcases and on-island events
- Familiarisation trips for overseas trade and media
- Third-party referrals from Ireland.com

Each year Tourism Ireland's in-market teams will "adopt-a-region" for additional focus. Regions will be aligned to Fáilte Ireland's visitor experience development plans (VEDPs) and Tourism Northern Ireland's experience brand.

Tourism Ireland will ensure that the island of Ireland is as easily purchasable as possible, engaging with trade, industry, and co-operative marketing partners to promote the island of Ireland in the right way, in the right place, and at the right time to deliver sales.

Industry

Tourism Ireland will continue to invest cooperative funds in supporting industry-led market sales promotion activity (IMAP).

By 2025, Tourism Ireland will prioritise the promotion of sustainable industry on its platforms, with a view to promoting only sustainable industry in the future. Industry engagement and communications will begin in 2023 to provide sufficient time for industry to prepare for this shift. All island alignment on the recognition of sustainable certification is necessary to successfully prioritise sustainable industry players. The implementation of this will be in close collaboration with sister agencies.

Trade

Tourism Ireland works with the international travel trade to help influence overseas consumers to visit the island of Ireland. Partners include traditional and online tour operators, travel agents including leading consortia and online intermediaries, and websites popular with potential leisure travellers.

A global key account management model (KAM) will be developed in line with the organisation's proposed Trade strategy to increasingly focus on the most impactful trade partners. This will help Tourism Ireland to focus its activities on the most important trade partners across the globe, rather than taking a market-by-market approach to trade prioritisation.

Trade FAM activity will aim to only involve sustainable products by 2025. The successful implementation of this will be dependent on sister agencies. Regional programming will be supported by capping the number of nights Trade FAM trips spend in Dublin.

Over the course of the Corporate Plan, Tourism Ireland will prioritise Trade based on their ability to support the value-adding tourism objectives (e.g., regional growth, shoulder season extension).

Co-operative marketing

Tourism Ireland's cooperative partnerships aim to increase destination awareness and deliver holidaymaker bookings to the island of Ireland. These partnerships are also an important tool in driving business to Northern Ireland and the regions of Ireland.

Air access co-operative partnerships are important for the development of new air travel routes across the island of Ireland. Many of these routes are now established. A set of complexities have emerged related to co-operative agreements with air carriers e.g., securing mutually beneficial terms of agreement, navigating multiple carriers serving the same route. For these reasons, a set of changes to air access co-op activity will come into effect in this Corporate Plan period:

- In mainland Europe and GB, Tourism Ireland will only carry out co-op funding for Northern Ireland and regional Ireland routes. This activity would be undertaken using jurisdictional-specific funding
- In North America and the Middle East, Tourism Ireland will only carry out co-op activity for shoulder season campaigns. This activity will need to be cash matched by partners
- In the first year of a new route (new city pair), Tourism Ireland will consider on a case-by-case basis providing co-op fundings. This will be based on the strategic objectives of the organisation
- Tourism Ireland will also increase "ease of access" messaging in its marketing activities

Co-operative trade partnerships may be undertaken subject to promoted travel taking place during shoulder/off-season periods and with the fewest possible nights in Dublin. The usual guidelines with regard to processes, practices and guidelines apply.

Business Tourism

It is anticipated that Tourism Ireland will be taking responsibility for the overseas promotion of business tourism (excluding association conferences) commencing in 2023. Plans and resources are under discussion.



Organisational excellence

Tourism Ireland's teams on the island of Ireland and globally are highly dedicated and effectively support tourism on the island of Ireland.

It is important that the organisation continues to grow and develop its skills, capabilities, capacity, and culture to sustain the success of tourism on the island of Ireland and deliver on Tourism Ireland's growth ambition. Through the life of this plan, Tourism Ireland will actively evolve and develop the organisation to ensure that it consistently performs to the highest level.

Organisation Design and Talent

The Corporate Plan 2023-2025 signals a shift for Tourism Ireland, as it looks to drive recovery in the tourism industry following the COVID-19 pandemic, while increasingly focusing its efforts on attracting value-adding tourism to the island of Ireland in line with the three strategic pillars of sustainability. As part of this shift, the current configuration of the organisation needs to be reviewed to ensure the organisation is fit for purpose (note this is not anticipated to include a grading review).

This review will go under the hood of Tourism Ireland to assess the as-is organisation, and has the potential to impact three areas of the organisation. Firstly, the organisation design itself may need to be updated to improve the organisation's ability to achieve its strategic objectives. Secondly, an assessment of the skills existing in the organisation is required to identify any gaps compared to the skills necessary to deliver this Corporate Plan. Lastly, any potential changes to the organisation design and any potential skills gaps may ultimately have an impact on Tourism Ireland's resources.

It is proposed that this review and the implementation of any subsequent changes will commence in Year 1 of this Corporate Plan.

The organisation will also continue to provide an excellent experience for its staff. The Tourism Ireland employer brand measurement achieves a top quartile performance with a minimum Staff Satisfaction rating of 80+%.

IT

The Information Technology function will deliver the corporate IT services and infrastructure required to deliver the Corporate Plan 2023-2025. The IT team will do so in full consideration of compliance and security requirements, and it will uphold strict data privacy policies in line with GDPR requirements. There will be a 3-year IT strategy developed to support the roll out of the Corporate Plan priorities.

As part of its activities over the Corporate Plan period, the IT team will expand hybrid working and complete the shift to becoming a fully cloud-based enterprise. ICT will support the consolidation of the four existing stakeholder B2B websites into a single stakeholder B2B website and continue to support the rollout of the organisation's CRM solution.

Diversity & Inclusion

An organisational review of Diversity & Inclusion in line with Tourism Ireland's organisational values will be completed and its findings will be implemented over the course of this Corporate Plan.

Sustainability review

An organisational review of environmental and social sustainability will be completed, and its findings will be implemented over the course of this Corporate Plan.

Data-driven culture

A greater application of data-driven decision making will be embedded in the culture of the organisation from Year 1 of this Corporate Plan. Marketing decisions (such as channel, market choices, messaging, media planning) will become increasingly evidence-based where possible, with improved quantity and quality of available data.

Governance and stewardship

Being cognisant of the fact that the investment in Tourism Ireland is from public funds, the agency will ensure that the highest standards of public office are applied, and that the maximum return to the exchequer is always sought. Specifically, Tourism Ireland will:

- Ensure that governance structures relating to the Board, oversight meetings and North South Ministerial Council operate effectively.
- Ensure that external validation, such as internal and external audits, meet requirements and is benchmarked as top quartile.

For the tourism sector to grow and prosper it must be appropriately and effectively funded with adequate private and public investment.

Financial stewardship

Tourism Ireland will continue to meet the highest standards of financial stewardship to ensure that the investment of public money is effectively used and achieves the returns intended. Tourism Ireland will continue to abide by the Financial Memorandum and relevant governance directions.

Risk and opportunity management

Tourism Ireland will monitor the industry, trade, market travel trends and the macro-economic conditions in the organisation's source markets to identify risks and opportunities and act accordingly. The organisation will adapt its activities to changing conditions by refocusing resources to address risks and opportunities. The organisation will make a strong, evidence-based case to government departments for increased investment in Tourism Ireland as well as Fáilte Ireland, Tourism Northern Ireland, and the wider tourism economy.

6. Operating plan allocation 2023-2025 (Budget allocation)

Investment required

Continued investment from the governments of Ireland and Northern Ireland is of vital importance for the delivery of the Corporate Plan. Without sufficient funding being made available to the organisation, there is a risk of not delivering the ambitions set out in the Corporate Plan.

Proposed budget allocation 2023-2025

€000's	2019	2023	2024	2025
	<i>Budget</i>	Forecast	Forecast	Forecast
Total Operating costs	23,067	27,566	29,220	30,096
Pay - Base line	13,721	16,766	17,772	18,305
Operating	9,346	10,800	11,448	11,791
Net Tourism Ireland Marketing expenditure	37,296	50,581	49,793	51,134
Tourism Ireland Net Core Expenditure	60,363	78,147	79,013	81,230
Northern Ireland Executive Investment – Core	12,989	14,859	13,593	13,593
Irish Government Investment – Core	47,374	63,288	65,420	67,637
Grand Total Investment required	60,363	78,147	79,013	81,230

Notes:

1. ROI capital monies included in Net Tourism Ireland Marketing expenditure
2. The additional €10m in 2023 is repeated in 2024 or 2025 and is core monies
3. No change in NI funding in period , NI core = £11,690k for all years.
4. Pay and opex inflation/increases are 6% pa for 2024 and 3% pa 2025
5. ROI funding increases for core are 4% pa for 2024 and 2025 to reflect media inflation, in addition to the €10m above.
6. €1.00 = £0.86 for 2023 to 2025, 2019 €1.00 = £0.90

7. Monitoring and evaluating implementation

Tourism Ireland is committed to the recovery of tourism on the island of Ireland, and this is a core objective of the Corporate Plan 2023-2025. The organisation has developed a set of CPIs to evaluate its performance, which will be monitored throughout Corporate Plan period.

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.

The CPIs cover each strategy pillar.

Economic

CPI 1 - Holidaymaker revenue for the island of Ireland in 2025 to be €3.9b/£3.4b (the equivalent of 2019 levels when accounting for inflation – Oct 22 inflation forecasts)

CPI 2 - Holidaymaker revenue for Northern Ireland in 2025 to be £266m (the equivalent of 2019 levels when accounting for inflation – Oct 22 inflation forecasts)

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.

Social

While noting the data limitations:

CPI 3 - Return holidaymaker revenue in the island of Ireland outside of Dublin to €2.4b/£2.1b in 2025 to 2019 levels accounting for inflation – Oct 22 inflation forecasts

CPI 4 - Return holidaymaker revenue for the island of Ireland in shoulder months (Mar, Apr, May, Oct) to €1,219m/£1,049m in 2025 to 2019 levels accounting for inflation – Oct 22 inflation forecast based on arrivals proportion of quarterly revenue

Environmental

CPI 5 - By 2025, prioritise the promotion of IOI sustainably certified industry (subject to scheme agreement)

Markets

CPI 6 - Holiday revenue for the island of Ireland from each of the top four markets (GB, US, DE, FR) in 2025 will be:

	Holiday revenue	% of 2019 in real terms
GB	€724m/£630m	106%
US	€1,269m/£1,103m	91%
DE	€371m/£323m	98%
FR	€185m/£161m	91%

Oct 22 inflation forecast

CPI 7 - A Mainland European assessment which will identify the best opportunities for sustainable growth to be completed by end of Q1 2024

CPI 8 – Operational assessment of Emerging Markets to be completed in 2023 with a wider assessment to include Australia/NZ to be finalised within one year of Ireland’s tourism policy and Northern Ireland’s tourism strategy being published

Customer

CPI 9 - New overseas consumer segmentation model to be embedded within Tourism Ireland and industry and influencing activity by end 2023

Industry and Trade

CPI 10 - Roll out new return on marketing investment metric for overseas trade events – independently evaluated benchmarks will be set in 2023 with a view to developing SMART PIs in 2024

CPI 11 - All co-op activities to demonstrate at least a 10:1 return on investment

Organisational

CPI 12 - Diversity & inclusion plan completed by end of 2023

CPI 13 - Skills analysis of the ESG capability in the organisation to be completed and a training plan to address skills gaps in place by end of 2023

CPI 14 - Develop a new marketing effectiveness metric for 2024 activity

CPI 15 - Benchmark employee engagement survey results against best in industry class and achieve accreditation by end of 2023

CPI 16 - Track the reputation of Tourism Ireland on the island of Ireland by 2025

CPI 17 - Financial stewardship: unqualified accounts with no priority 1 audit findings and administer expenditure in line with +/- 1% maximum unplanned or forecast variance threshold

8. Conclusion

Over the three years of this Corporate Plan period, Tourism Ireland will continue supporting the recovery of the tourism industry following the COVID-19 pandemic, while increasingly focusing its activities on attracting the types of holidaymakers that will enable the island of Ireland to build and maintain a sustainable tourism industry for the future.

Tourism Ireland's strategy is built upon three strategic pillars – economic sustainability, social sustainability, and environmental sustainability. These strategic pillars signal a shift for the organisation towards sustainable tourism, in line with the anticipated direction of government policy in Ireland and Northern Ireland.

The relative focus Tourism Ireland places on these three pillars is expected to change over the course of the plan, with economic sustainability being of primary importance to initially secure the economic viability of the industry. However, the organisation will maintain the flexibility needed to adapt to market changes throughout the course of this plan, specifically through its annual business planning process.

Appendices

Exchange rate

Exchange rate: €1: £0.86

Measurement indicators 2020-2022

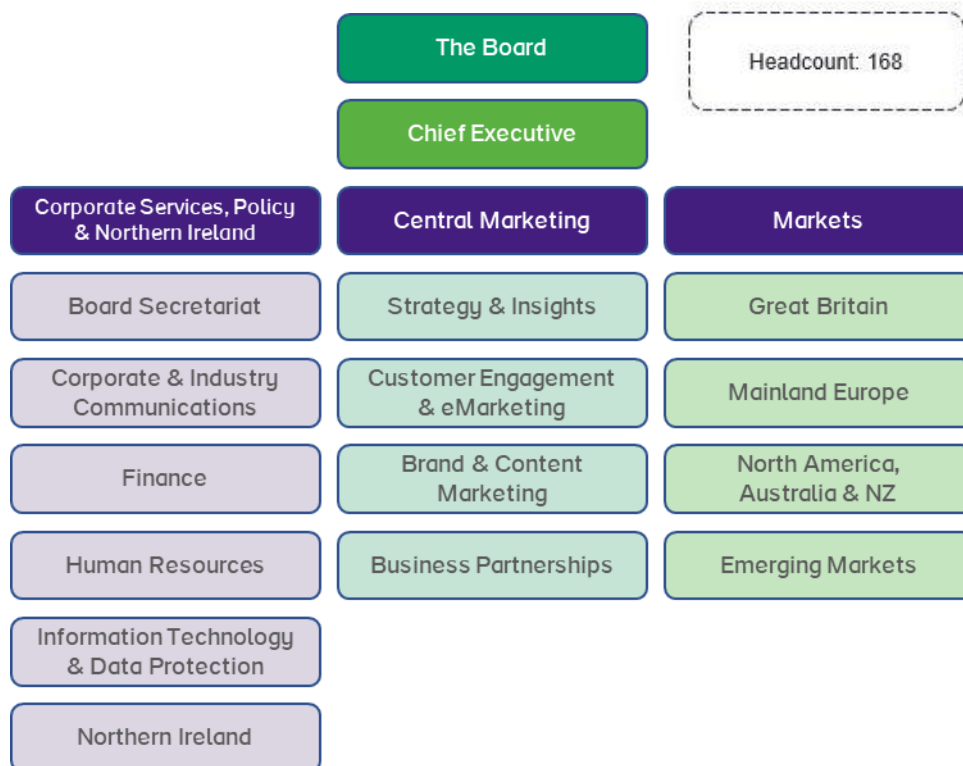
Tourism Ireland developed and deployed (where possible) a series of working plans informed by the impact of the numerous different waves of COVID-19. These working plans were cognisant of the prevalent health advice both on the island of Ireland and in key source markets. There was a high degree of fluidity regarding planning and deployment, and the ability to measure marketing results were severely curtailed. The Board and sponsor departments were kept fully apprised throughout this period.

Revised KPIs 2021 and 2022	Outcome
2021	
Nurture and build pent-up demand to restart tourism to the island of Ireland quickly. In line with the RESTART principles, achievement during this phase will be based on visitor volume.	Activity ran throughout the pandemic, adapting to the travel situation at the time. Reports from partners across the globe confirmed a strong pent-up demand for travel to the island of Ireland, this was seen in the resultant travel volumes during summer 2022.
Develop and launch a new consumer campaign 'Green Button'	The Green Button campaign was developed to create a 'come now' message. It was launched across the world at the end of 2021 and ran throughout 2022.
Launch campaign across 10 markets by end 2021	
Present a sustainability action plan to the Board by end 2021 which will guide Tourism Ireland's actions throughout this plan	A sustainability action plan was presented to the Board as planned.
2022	
In 2022, welcome 8 million tourists to the island of Ireland <ul style="list-style-type: none"> 6.8m to Ireland (71% of 2019 levels) 1.6m to Northern Ireland (72% of 2019 levels) 	Official figures are unavailable for 2022, however indications at the time of writing would suggest between 75%-80% of tourists and 70%-75% of holidaymakers compared to 2019 levels.
The campaign to have been seen by 150m potential visitors by end 2022	263.1m estimated consumers reached by end of Q2.
Make available industry offers as part of the Green Button campaign from launch to end of 2022	1,829 offers have been made available by end of Q2.
Deliver 3.2 million commercial third-party digital referrals in 2022 to help close the sale	4.2m commercial third-party digital referrals delivered by end of Q2.
Deliver the 2023-2025 Corporate Plan by end 2022 with sustainability at its heart	The Corporate Plan development has now been completed and signed off by the Board.
Develop a suite of digital lead metrics to measure effectiveness and return on investment	Work is ongoing - to be informed by Board ROMI committee.

Present a redeveloped segmentation model to the Tourism Ireland Board for approval by end 2022	A contractor has been commissioned to undertake the new segmentation programme and work has now commenced. The deferred start due to COVID and awaiting consumers to have experienced travel puts end of year delivery at risk, but the work will now move at pace through the remainder of the year.	Amber
The Tourism Ireland employer brand measurement achieves a top quartile performance as evidenced by a Staff Satisfaction rating of 80+%	Result: 79% Commentary: 48% of the organisation have high levels of trust with a further 31% having medium levels. Survey results being shared through the organisation with action planning commencing from August onwards.	Amber
Financial stewardship: no priority 1 audit findings and administer expenditure in line with +/- 1% variance threshold	No priority 1 items in the internal audit reports completed in the year to date. Expenditure target y/e target only.	Green

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

Organisation chart



Communicating the corporate plan

In preparing the Corporate Plan 2023-2025, Tourism Ireland engaged closely with its stakeholders through a series of meetings, including:

- Senior Management Team (SMT) 1-1s and meetings
- Board meetings and working sessions
- Oversight & Liaison (O&L) Group meeting
- NI Tourism Alliance (NITA) & Ireland Tourism Industry Confederation (ITIC) meeting
- Central Marketing Partnership Group (CMPG) meeting
- US, Germany, France, and Spain Marketing Partnership Group (MPG) meetings

Upon completion of the corporate plan, Tourism Ireland will ensure the plan is effectively communicated across its key stakeholders and within the organisation.

Proposed communications framework:

Proposed communication method	Description of interaction	Proposed interaction groups
Internal communications	<p>Presentation will be given at the all staff conference.</p> <p>The Corporate Plan will be used extensively with teams as part of the annual business planning.</p> <p>Opportunities for Q&A are available via regular all staff webinars or via team management structure or S&I.</p>	<ul style="list-style-type: none"> • Tourism Ireland staff
Industry on the island of Ireland	Strategy to be communicated at the annual Marketing Plans Launch to industry	<ul style="list-style-type: none"> • Industry
Following formal approval of the plan		
Formal release of document	Finalised Corporate Plan document to be released to the Board and key stakeholders (government departments and sister agencies) upon completion of the plan	<ul style="list-style-type: none"> • Fáilte Ireland & Tourism Northern Ireland (TNI) • Governments of Northern Ireland and Ireland
Press release and external publication	Publication on Tourism Ireland's website.	<ul style="list-style-type: none"> • Wider public • Prospective tourists • All tourism industry stakeholders

Proposed 2023 Budget and Indicative Allocations for 2024 & 2025 In Euros 000's

	Approved budget 2022	Proposed budget 2023			Indicative budget 2024			Indicative budget 2025		
<i>€1 = £0.86GBP</i>	Total	Resource	Capital	Total	Resource	Capital	Total	Resource	Capital	Total
Programme	68,358	43,541	7,040	50,581	42,753	7,040	49,793	44,094	7,040	51,134
Total Programme Expenditure	68,358	43,541	7,040	50,581	42,753	7,040	49,793	44,094	7,040	51,134
Pay Costs	14,400	15,966	0	15,966	16,972	0	16,972	17,505	0	17,505
Pension Costs	1,091	1,091	0	1,091	1,091	0	1,091	1,091	0	1,091
Non Pay Admin Costs	9,900	10,800	0	10,800	11,448	0	11,448	11,791	0	11,791
Total Admin Costs	25,391	27,856	0	27,857	29,511	0	29,511	30,387	0	30,387
Overall Total Expenditure (Programme & Admin)	93,749	71,398	7,040	78,438	72,264	7,040	79,304	74,481	7,040	81,521
Proportion payable by NI representing X%	13,884	15,150	0	15,150	13,884	0	13,884	13,884	0	13,884
Proportion payable by IRL representing X%	79,865	56,248	7,040	63,288	58,380	7,040	65,420	60,597	7,040	67,637
Overall Funding	93,749	71,398	7,040	78,438	72,264	7,040	79,304	74,481	7,040	81,521
Projected staff numbers		168			168			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.

Note, NSMC approved headcount is 160.