



Tourism Ireland

**MARKETING PLANS**

**2025**



# Anton Savage



**Christopher Brooke**  
Chairman

# Feargal Ó Coigligh

Secretary General

Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media





**#T12025**



**Alice Mansergh**  
Chief Executive

# Welcome





# Our Tourism Ecosystem





## Overseas tourism matters

~€7bn

per annum

~+10%

year over year



## Overseas tourism matters

**3.7x**

spend

**3x**

duration per trip  
vs  
domestic



**Overseas tourism matters**

Of

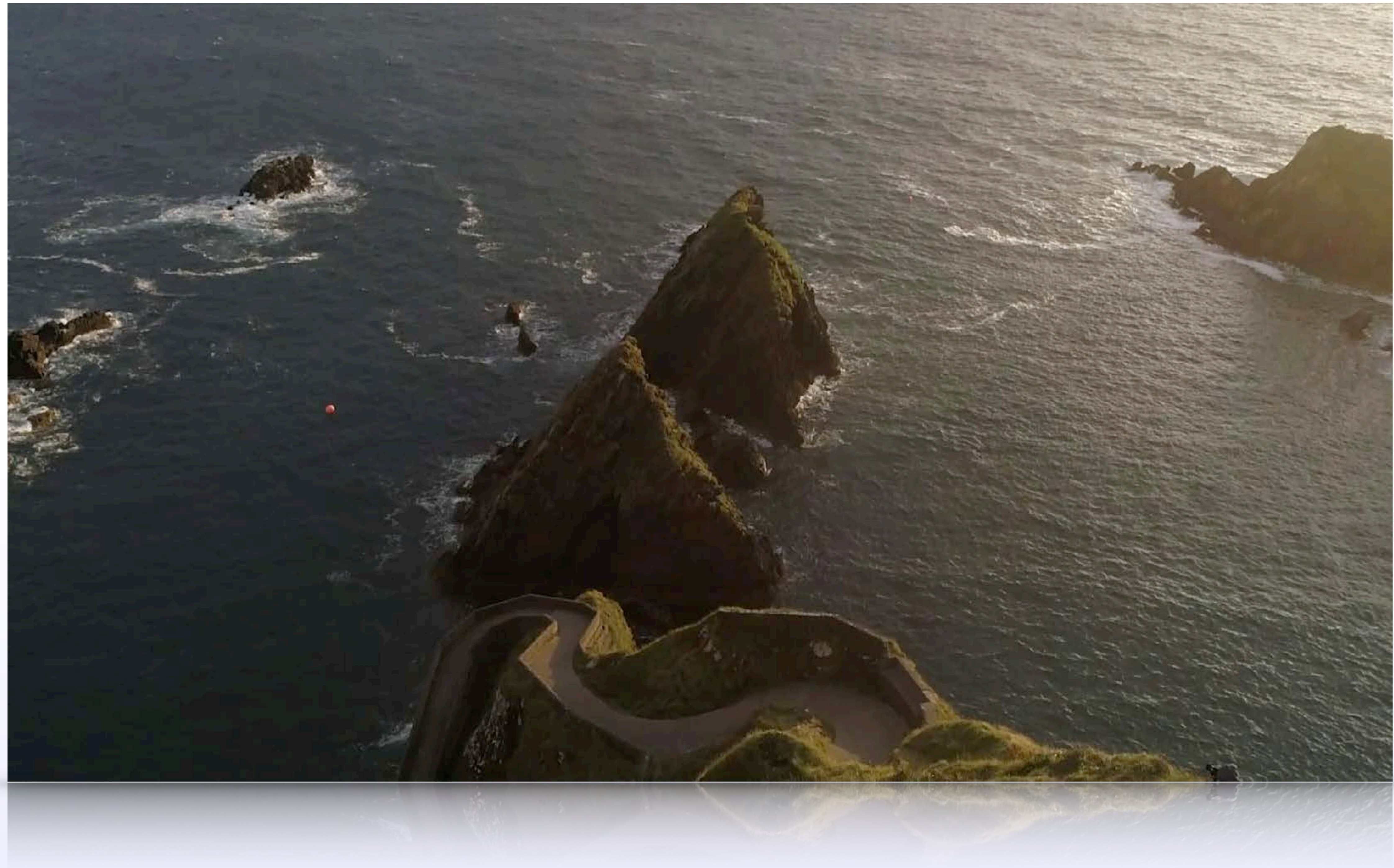
**300k ~60%**

**tourism jobs**

**rely on overseas**



Thank You





**Bringing value to this island**

**€1 → €25**

Source: Estimated from Kantar research study



# Looking ahead: strengths

## 4 S's



Sentiment



Supply of  
accommodation



Scenery



Soft  
influence



# Looking ahead: challenges

## 4 C's



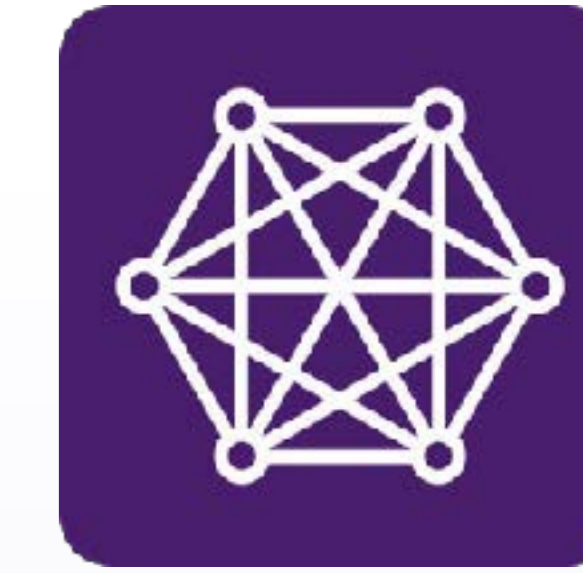
Capacity



Cost



Concentration



Complexity





## Vision

Increase the **value of overseas tourism** to the island of Ireland, sustainably supporting **economies, communities and the environment.**

We do so by **inspiring visitors, strengthening strategic partnerships** and fostering a **world-class team.**

An aerial photograph of a rugged coastal cliffside. The cliff face is composed of layered, greyish-brown rock, showing signs of weathering and some yellowish lichen. At the top of the cliff, a long, low stone wall runs across the width of the frame. Two small figures of people, one in a blue shirt and one in a pink shirt, are standing on the flat top of the cliff, looking out over the landscape. The ocean is on the left, with white-capped waves crashing against the base of the cliff. The sky is a clear, bright blue with a few wispy clouds. The overall scene is one of natural beauty and historical significance.

**Increase the Value of Overseas Tourism**



# Increase the value of overseas tourism

Revenue growth

**+5.6%** average year on year to 2030



# Increase the value of overseas tourism

Regional and seasonal growth

**+6.5%** year on year to 2030



# Increase the value of overseas tourism

Worth

€9bn

to the island by 2030

# Increase value: strengthening strategic access



Demand for **regional and NI routes**

**Inbound visitors** on Dublin routes

**Spend per trip** – attracting visitors who want to see more and do more



## Increase value: **Enrichment Explorers**

Focus on visitors with  
**‘value adding tourism traits’**

– likely to see more, do more, enjoy  
more and spend more while on the  
island

## Study of Enrichment Explorers

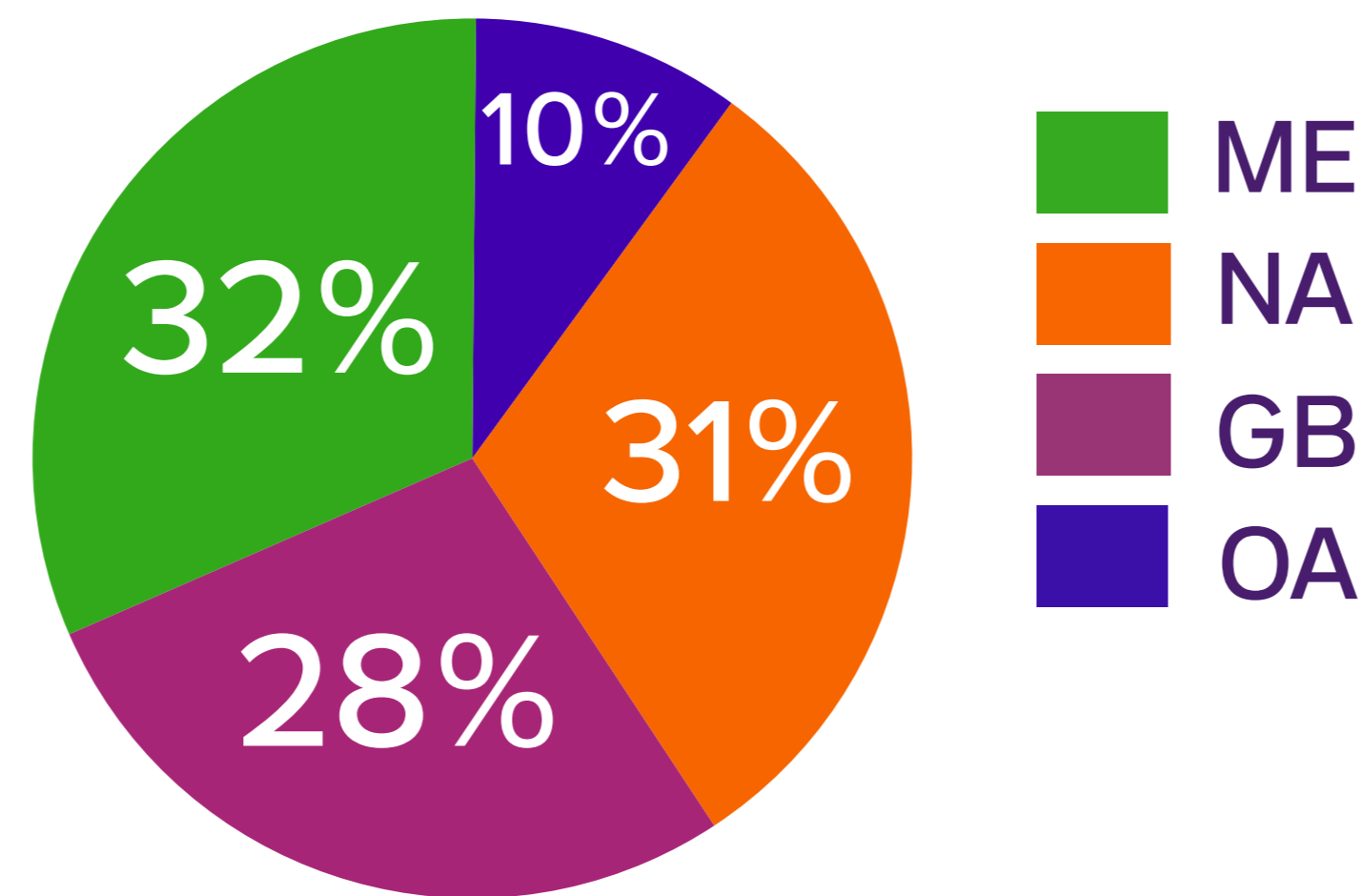


Source: Kantar research output



€ million  
2,000

## Visitor spend: island of Ireland



ME  
NA  
GB  
OA

1,000

2023  
2024

0

US  
Great Britain  
Germany  
France  
Spain  
Canada  
BeNe  
Italy  
Nordics  
Switzerland

## Increase value: market growth and diversification

Grow **US** and **Canada** momentum

Build on strong foundations from **GB**

**Mainland Europe** appraisal to drive share  
breakthrough

Source: CSO and NISRA (2023) / Tourism Economics (2024)

A panoramic view of a coastal town at sunset. The foreground shows a harbor with several fishing boats and a white pier. The middle ground is filled with a dense cluster of colorful houses in shades of green, blue, yellow, and red. The background features rolling hills and a prominent mountain peak under a sky with soft, colorful clouds. A single bird is seen flying in the sky.

# Supporting Economies and Communities

# Over-tourism headlines hit Europe

**Le Monde**

INTERVIEW • LETTRES DU MONDE

### Florence interdit les boîtes à clés, symbole du surtourisme

La capitale toscane est confrontée, comme d'autres cités de la Péninsule, à un afflux de touristes qui provoque des difficultés à se loger pour les habitants et un dépeuplement du cœur historique.



**Opinioni**

### «Over-tourism», in Italia ci sono troppi turisti? Proposte per superare l'emergenza e non perdere ricchezza

La crescita del turismo sostiene l'economia, ma con effetti collaterali negativi: dall'impatto sui territori al costo degli affitti, alla minore qualità del lavoro.



**CNN travel** Destinations Food & Drink News Stay Video


### 'A point of no return:' Why Europe has become an epicenter for anti-tourism protests this summer



(CNN) — Anti-tourism protests have been sweeping across Europe this summer, with demonstrations taking place in the Netherlands, Greece, and, of course, Spain.

**INDEPENDENT**

### Venice to introduce even stricter rules in its ongoing battle with overtourism



**Forbes**


### 'Tourismphobia': Protests, Bans, Fees And Fines At European Hotspots To Keep Visitors Away



**sky news**

### Pompeii to limit number of visitors to 20,000 a day in bid to cope with overtourism

The move follows other European tourist hotspots, including cities like Barcelona and Venice, which have taken steps to tackle overtourism.



**EL PAÍS**

### Unas 10.000 personas vuelven a salir a la calle en Canarias para protestar contra el turismo masivo

Las manifestaciones se celebran en los principales puntos turísticos de las islas, con menor repercusión que las del 20 de abril.



**SPiegel Panorama**

### 20.000 Menschen marschieren auf Mallorca gegen Massentourismus

«Der Luxus, unser Elend»: Mit solchen Slogans machen Mallorca-Anwohner und Mallorquiner ihrem Ärger über einen Demo in Palma Luft. Sie beklagen die Folgen des Tourismus – Stau, Druck und lauterer Verkehr.

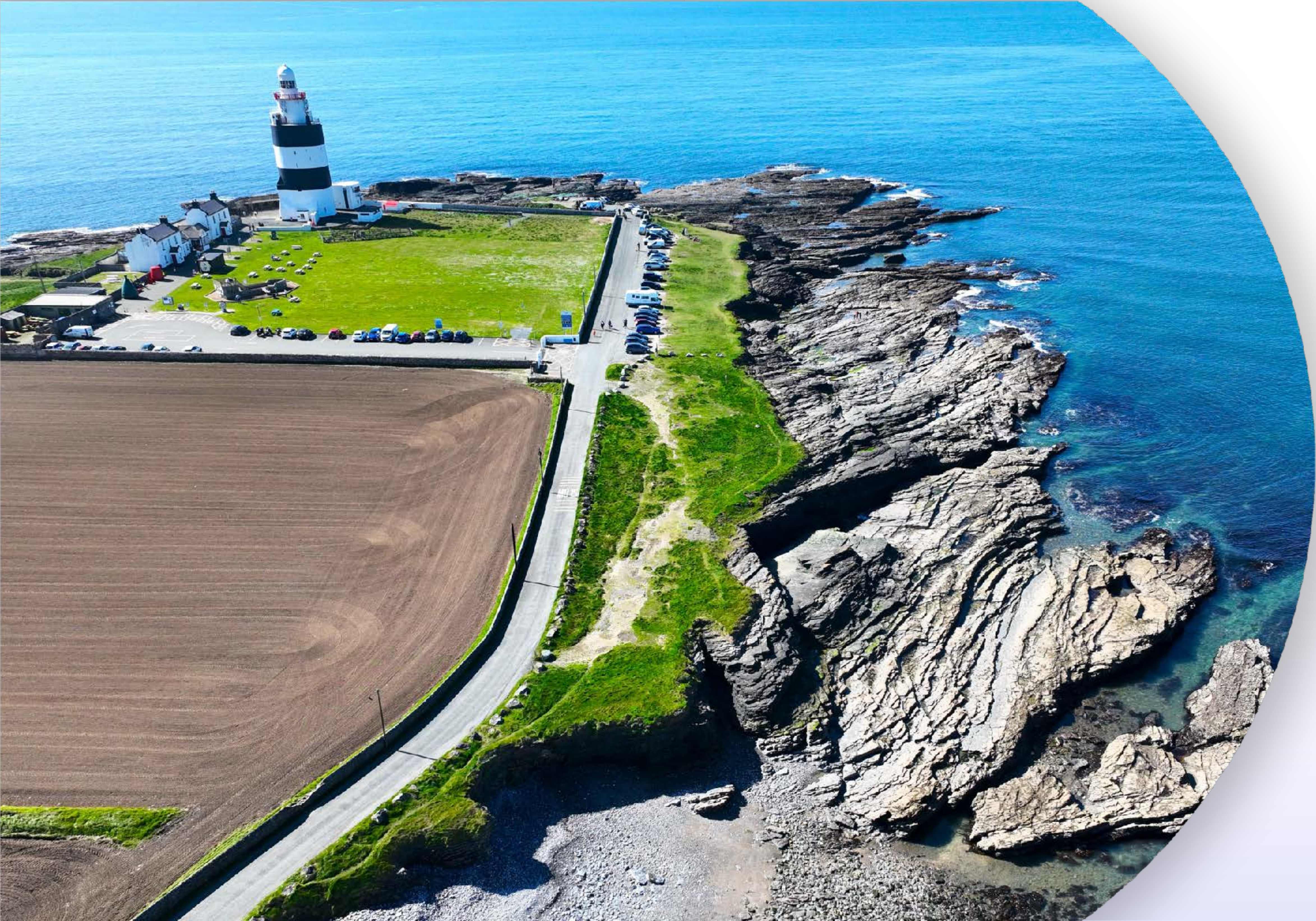


**The Guardian**

### Protests over mass tourism could spread beyond Spain, says Unesco official

Situation 'out of balance' as local people are priced out of housing and frustrated by hordes of selfie-seekers





# We have a chance to do things differently

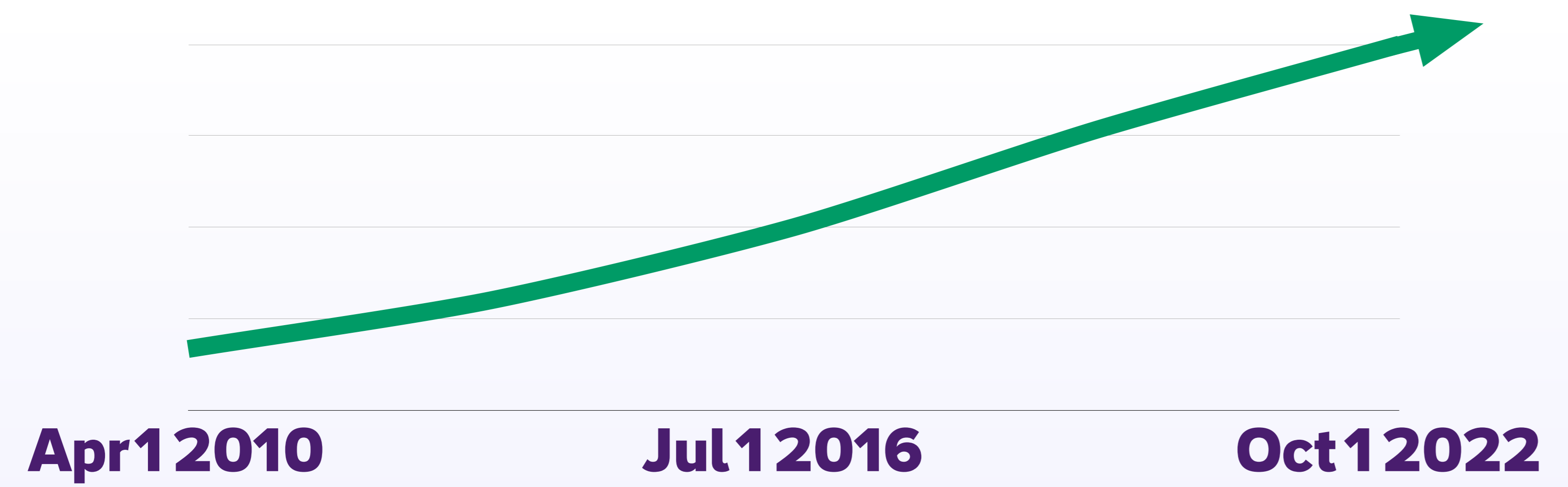
~**70% jobs** outside Dublin and Belfast

Largest indigenous shared industry on this island

**9/10** believe **tourism is positive** for their community

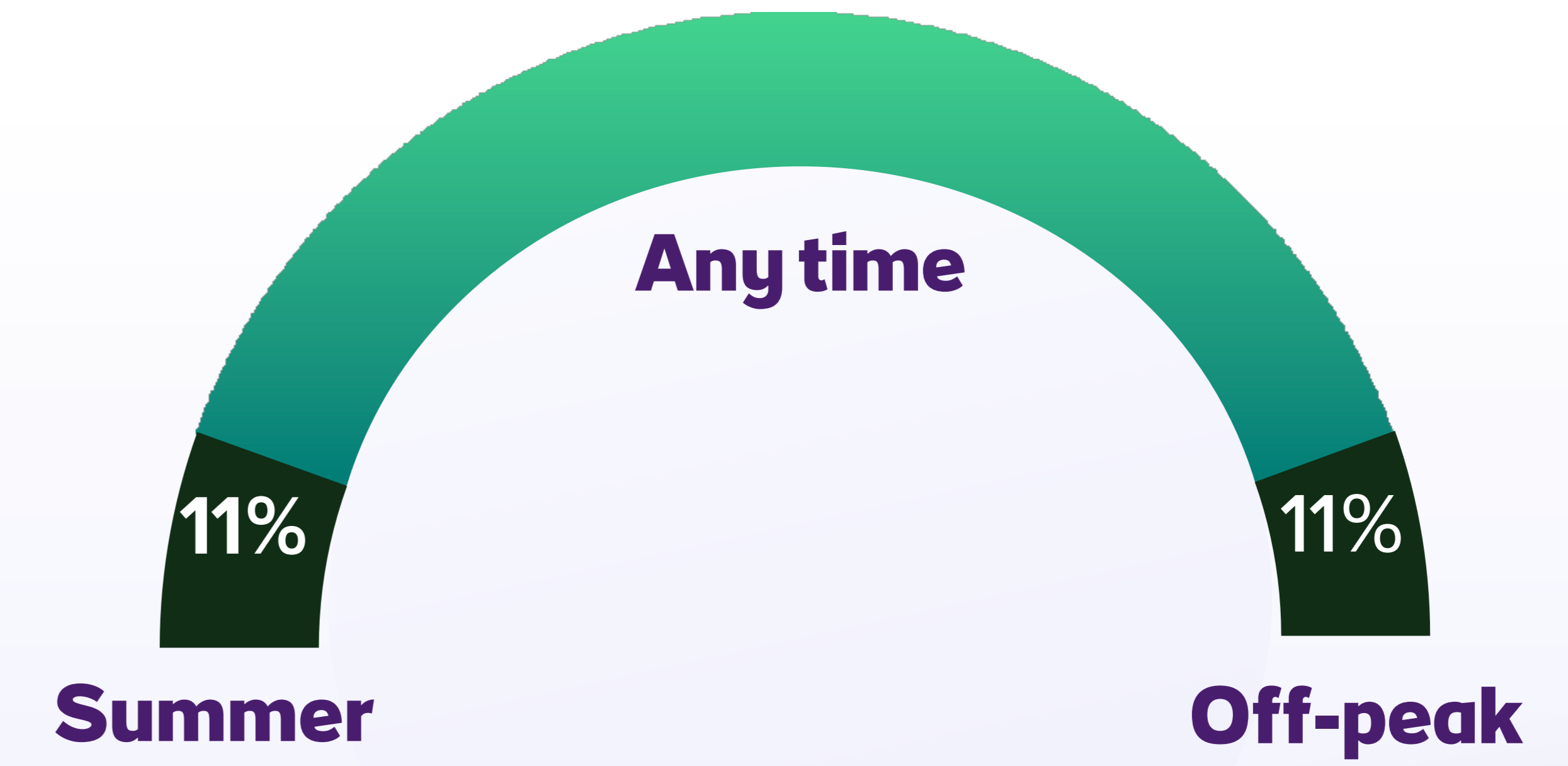
# Tapping into visitor sentiment

Online searches for 'hidden gems' **+600%** since 2010



Source: Google Trends

**78%** believe the island of Ireland is a destination for **any season**



Source: Red C / Tourism Ireland Sentiment Tracker

# Spread across seasons: 'must visit' moments



**Spring**  
St Patrick's Day



**Summer**  
'Slow Tourism' month



**Autumn**  
Halloween



**Winter**  
Winter breaks



# St Patrick's Day

Results:

**230m** Reach

**Ireland Week** in 11 cities across Europe

**4X** research 'Ireland' vs spring averages

**2025:**

Focus on  
festivals and  
global unifying  
moments



# Home of Halloween

**2025:**

Focus on  
festivals and  
things to do

Results:

**>200m**

Opportunities  
to see

**14M YouTube**

**2X** recognition of origins in Ireland

**7/10** more likely to want to visit







# Championing communities

**1bn**

**Publicity opportunities to see**  
to feature seasonal or regional Ireland / NI message

**70%**

**Social content**  
with regional / seasonal Ireland / NI message



# Wild Atlantic Way


Results:

**60m** Opportunities  
to see

**+90% persuasion**



**What fills my heart?**

Ireland 



## **Shared Island: Vision for the North West**

**Two awe-inspiring coasts, one epic trip**

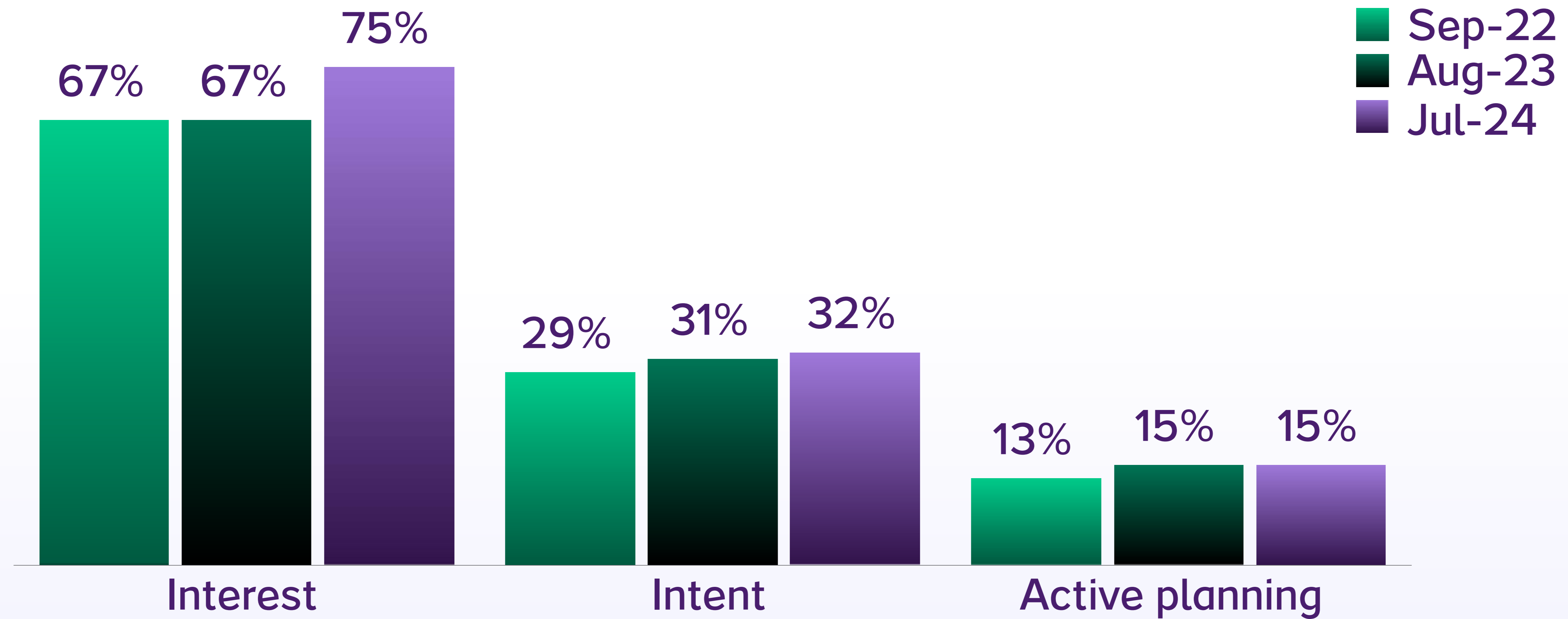
**Connecting the Causeway Coast and Wild Atlantic Way for visitors**

A wide-angle landscape photograph of a rugged coastline. In the foreground, a person wearing a bright green jacket and dark pants stands on a grassy, rocky cliff edge, looking out over the ocean. The middle ground features steep, rocky cliffs with patches of green vegetation, leading down to a deep blue bay. The background shows the ocean stretching to the horizon under a clear, bright sky. The overall scene is inspiring and scenic.

# Inspiring Visitors

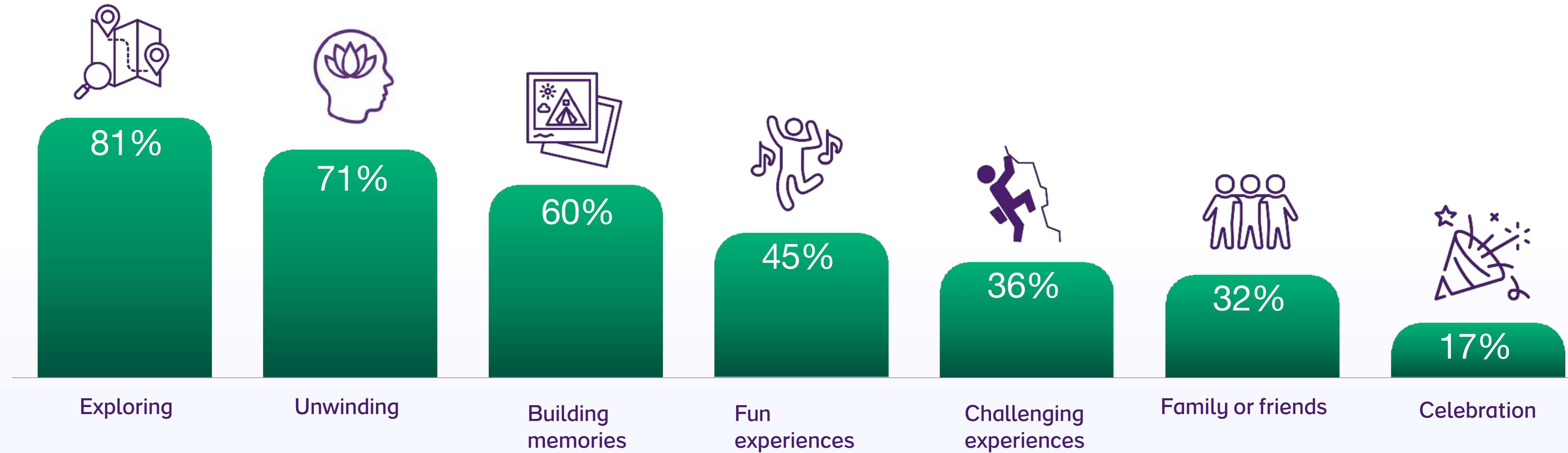
**Aidan Power**  
Director of Marketing

# Visitors are interested in the island of Ireland



Source: Red C / Tourism Ireland Sentiment Tracker (top 4 markets)

# Desire for exploration



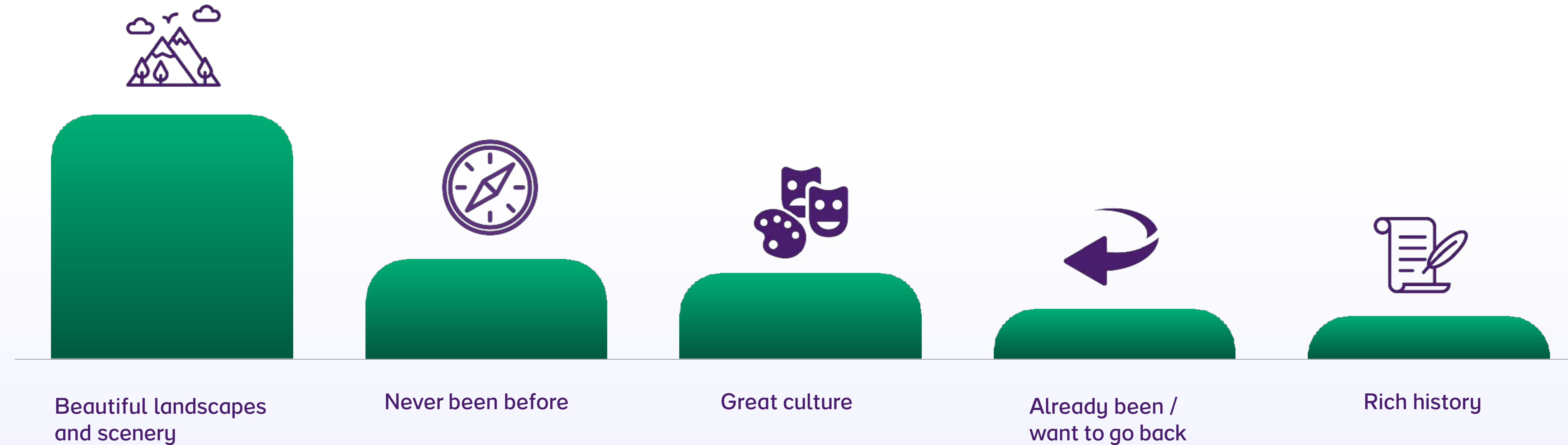
## Needs of travellers

Source: Red C / Tourism Ireland Sentiment Tracker  
(travel to non-sun destinations)



# Landscape, culture and history are reasons to visit

Among those planning for the next 6 months / 12 months / 3 years / in future



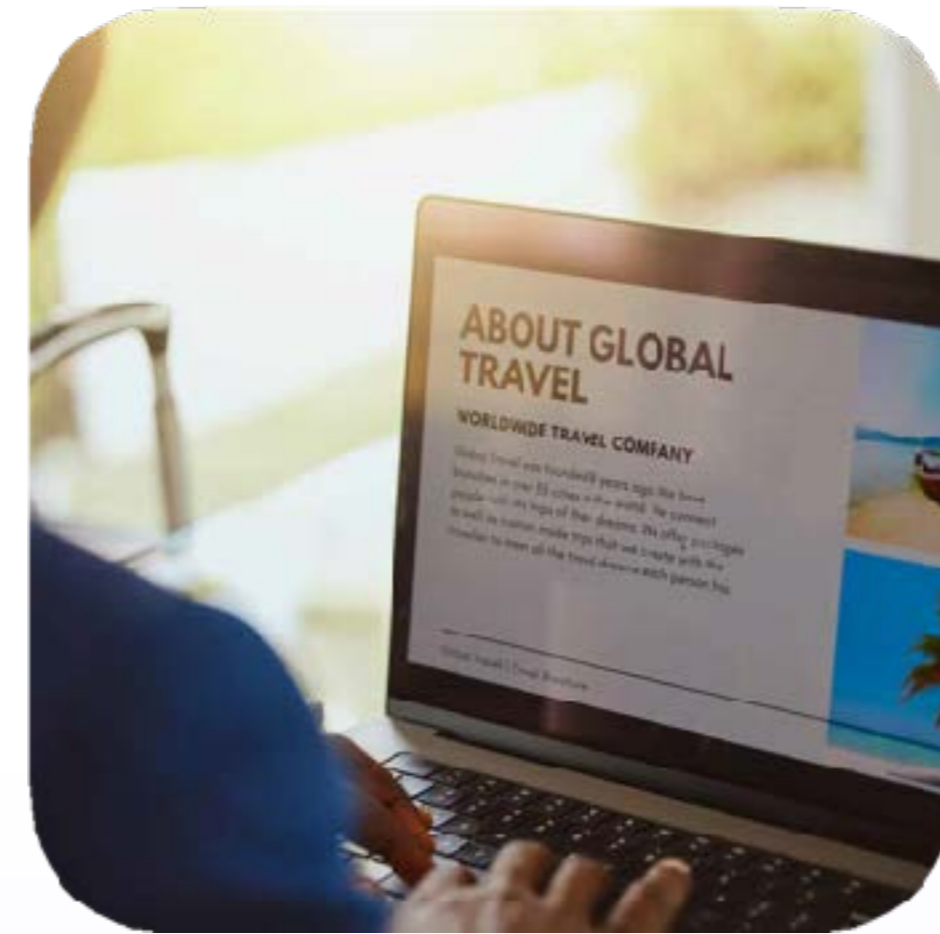
Source: Red C / Tourism Ireland Sentiment Tracker  
(travel to non-sun destinations)

# How people research and book travel is changing



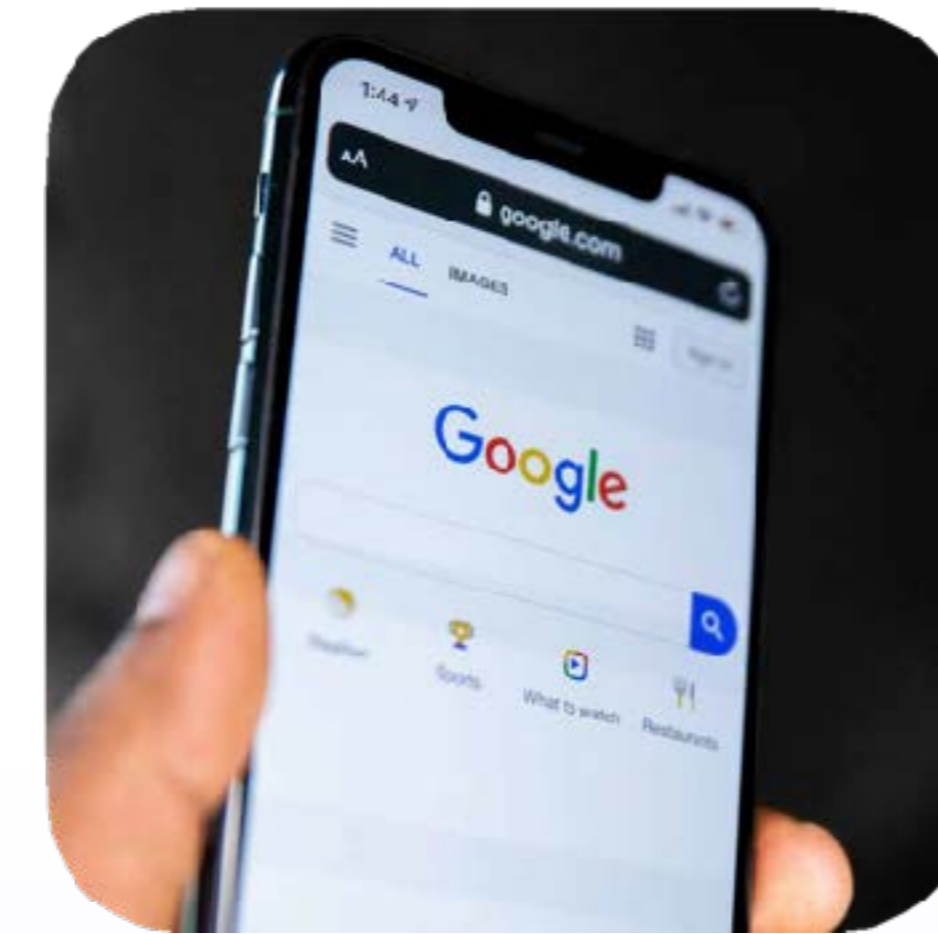
Early 2000s

Travel agents and brochures



Mid 2000s

Ever-increasing role of travel websites



Late 2000s - 2020  
Age of mobile

Rise of mobile search, social and online video

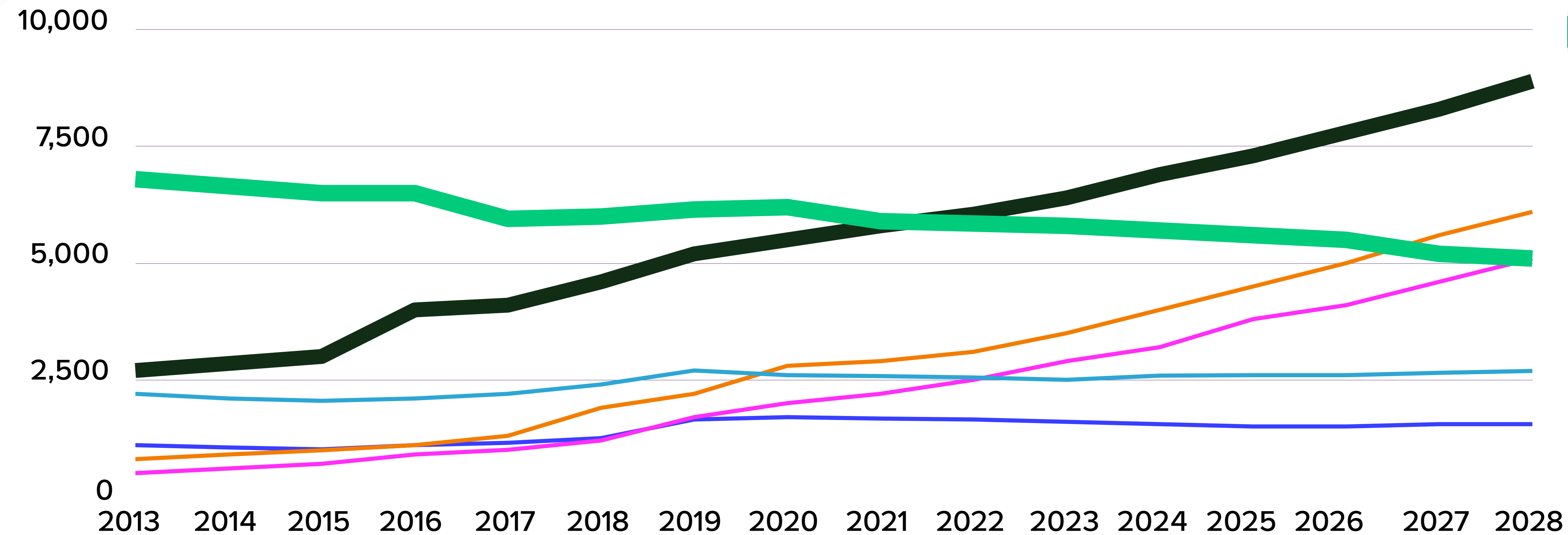


2020 - 2030  
Rise of AI

AI trip planners

# More time now spent on social than TV

Among 30-60 year olds globally



**Opportunity:**  
be the leading tourist  
board in social and  
online video  
relevance

- Linear TV
- Social media
- Radio
- Video stream
- Music stream
- Print

Source: Global WARC study



# Winning visitors: an art and a science





## **Visitor awareness and consideration**

– telling our story overseas

**2025 new brand campaign**

**2025:  
1bn  
Advertising  
opportunities to  
see**



## **Visitor awareness and consideration**

– teeing up others to speak for us

# Visitor awareness and consideration

– teeing up others to speak for us



**2025:**  
**1.6bn**  
**Publicity**  
opportunities  
to see



**Dermot's Taste of Ireland**  
ITV1 and ITVX (GB)





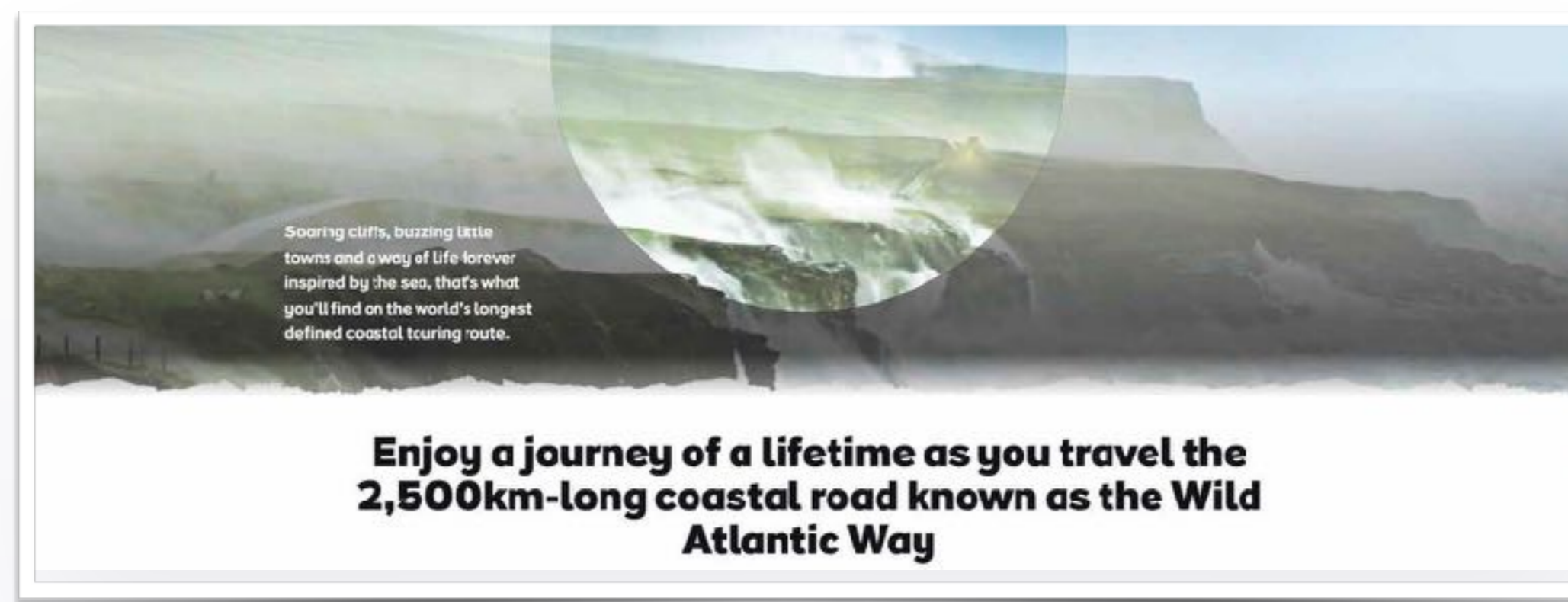
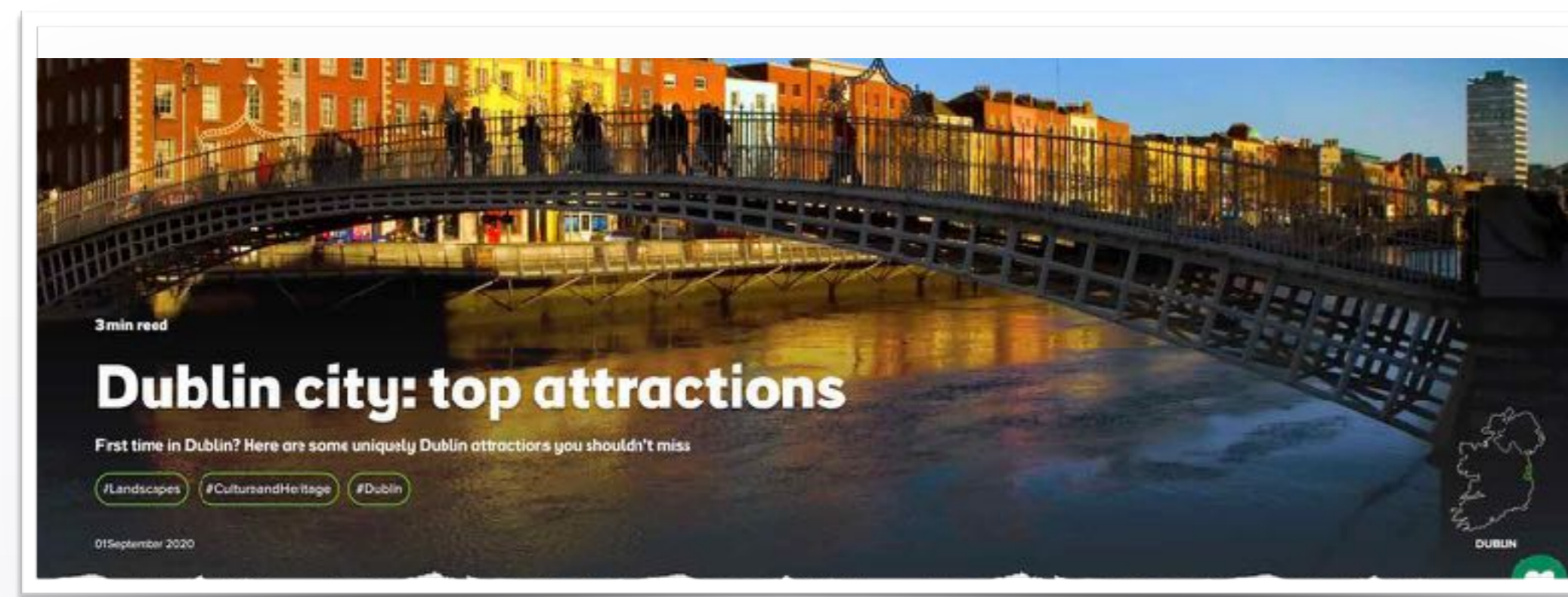
**L'île d'Émeraude et  
le désert de pierres /  
The Emerald Isle and  
the stone desert**

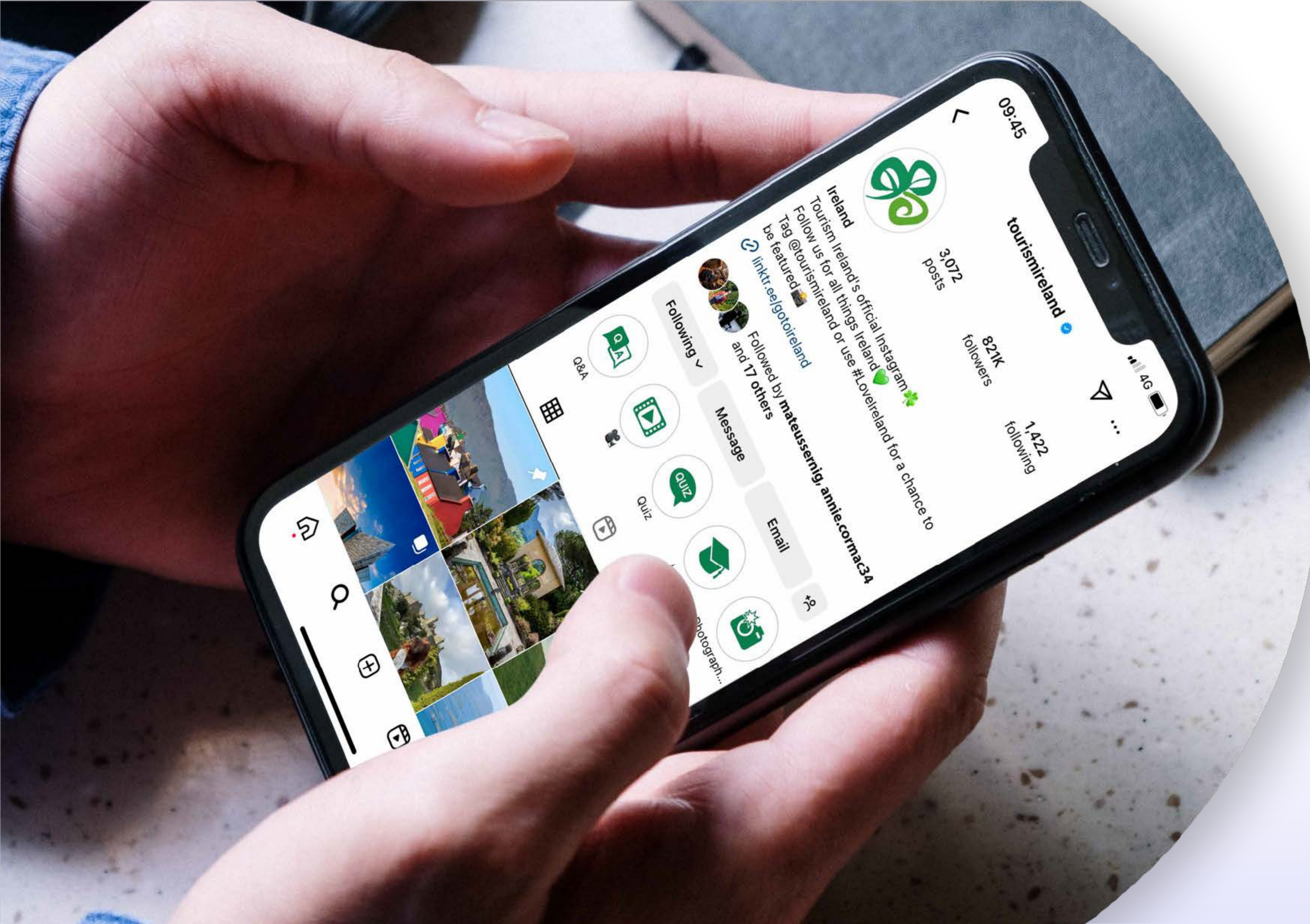
ARTE (France, Germany),  
3sat (Germany), ORF (Austria),  
SVT (Sweden) and PBS (US)

# Visitor research: balanced shop window for things to see and do

2025:  
10m

Deep research visits,  
leveraging and  
informing AI

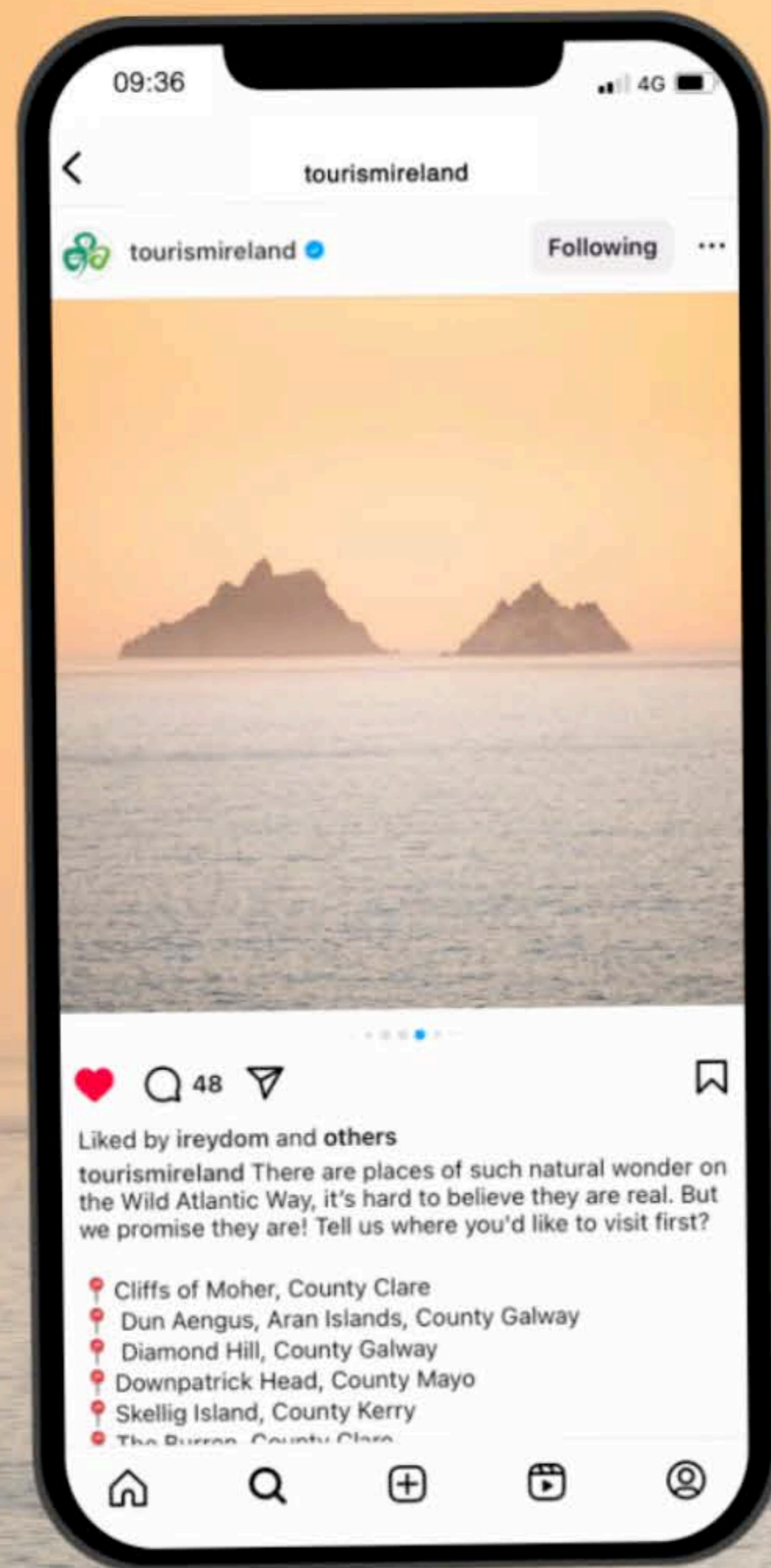




## Visitor advocacy: posting daily to fans on social media

**2025:  
7.5m  
Followers on  
social**

# Itineraries on social media: up to +30% engagement



A photograph of a forest path in autumn. The path is covered in fallen brown leaves and leads through a dense forest of trees with vibrant yellow and green foliage. The scene is brightly lit, suggesting a sunny day.

**Shane Clarke**

Director of Corporate Services,  
Policy & Northern Ireland

**Sustainability**



# Sustainability: responsibility

EU targeting **decarbonisation** of aviation

**70% sustainable aviation fuel by 2050**  
– but it's an emerging technology

**2025:**

Grow revenue responsibly, factoring in revenue per carbon footprint



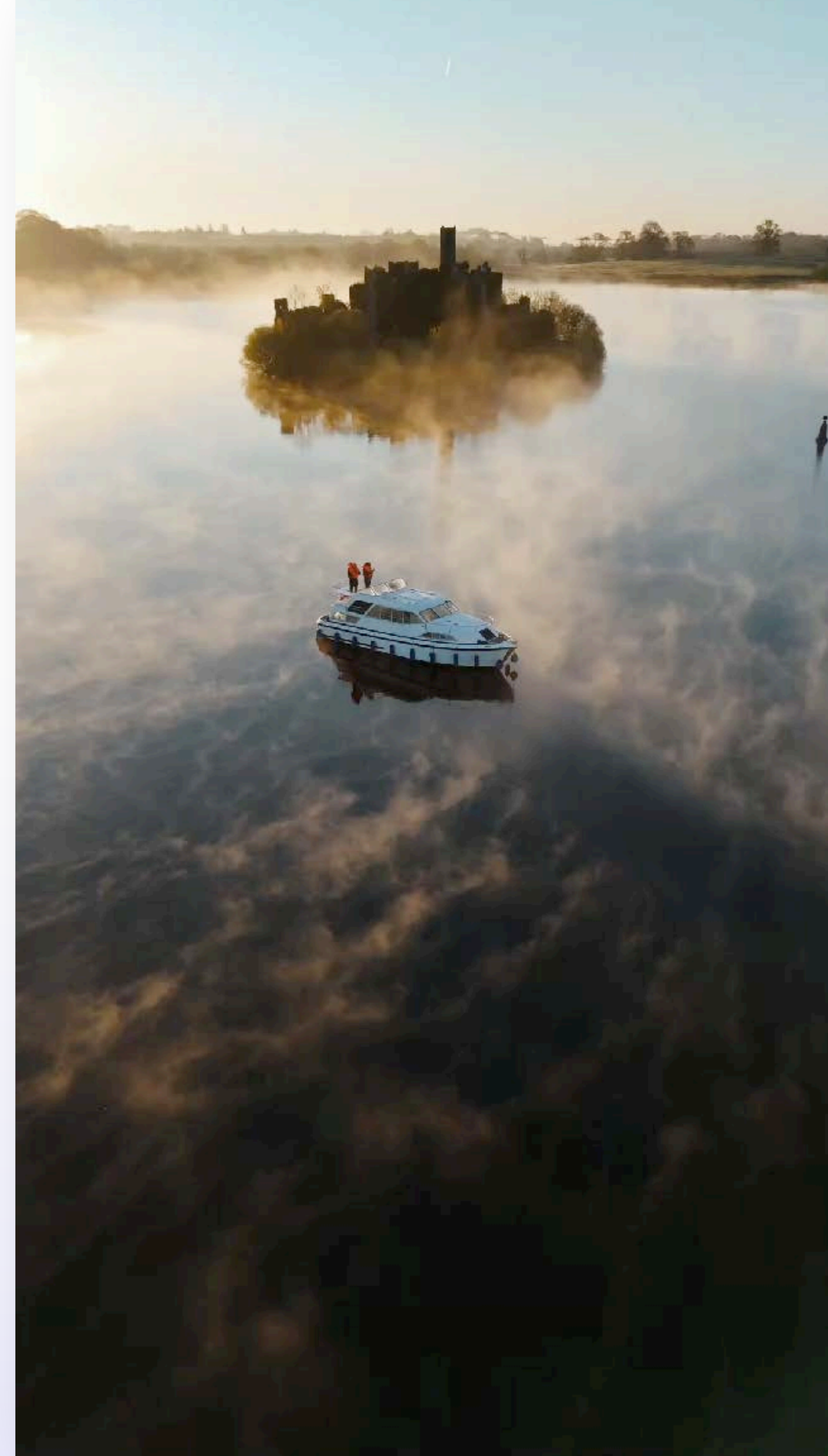
**Sustainability: opportunity**

**50%**

Prepared to spend more on **sustainable accommodation** and **experiences** when on holidays

Source: MCCP / Tourism Ireland

## **Sustainability: opportunity**



**2025:**  
Launch immersive  
**'Slow Tourism'**  
month  
itineraries for lower  
carbon, higher dwell time  
in nature and  
communities



# Sustainability: slow tourism



An aerial photograph of a golf course and a large, multi-story stone building complex. The golf course is on the left, featuring green fairways, sand traps, and a winding water hazard. The building complex is on the right, with a prominent central tower and several wings. The background shows rolling hills under a clear sky.

# Strengthening Partnerships

**Siobhan  
McManamy**  
Director of Markets &  
Partnerships

# Access partnerships

**2025:**  
Strengthen demand  
for regional routes,  
with 10:1 ROI

Vols de Paris CDG à l'aéroport de Shannon

**Découvrez l'Irlande**  
à partir de **59.99€**  
par trajet pour un vol aller-retour

*Bagage de 10kg inclus!*

Irlande 

**Experience Ireland's Ancient East and**  
*Sea travel differently*

**BOOK NOW**

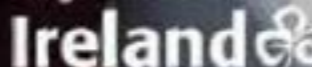
IRISH FERRIES | Fill your heart with **Irlande** 

Pembroke to Rosslare  
**€70 OFF**  
Return car sailings up to 16 May '24

Somewhere in Northern Ireland

**Gemma gets her sea views**

Book your trip at [stena.com](http://stena.com)

Fill your heart with **Irlande**  **Stena Line**

Irlanda 

Bilbao - Rosslare  
DESDE **169 €**

por travesía. Incluye coche, 2 pasajeros y asientos reservados

ESCÁPATE A LO GRANDE AL ANCESTRAL ESTE DE IRLANDA ESTA PRIMAVERA

Plane deine Reise nach Nordirland mit Lufthansa!

You are flying with **Irlande**  **Lufthansa**

ABGs von Lufthansa auf [www.lufthansa.com](http://www.lufthansa.com)

**EPIC JOURNEYS AWAIT IN SHANNON.**

Fill your heart with an Ireland vacation, starting with nonstop Delta® flights from New York City (JFK) to Shannon Airport beginning May 23!

*Go Beyond the Flight*

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Flight ratings subject to change without notice. Daily nonstop flights available May 23 - September 8, 2024, and five times a week September 10 - October 4, 2024 ©2024 Delta Vacations DV1816907



## Global partnerships

Focusing on **highest revenue per carbon footprint** segments around the world



# Partnerships to amplify sporting moments

**American College Football** boosts US visitor numbers each year

**Valued at >€100M per annum**

Spotlight on the island before and during game

Footage reaches **2M** back home, game reaches **5M**

**2025:**

Attract visitors and spotlight travel before and during



# Golf

Golf visitors **spend more** than non-golf visitors

Amplify **The Open at Royal Portrush** and **Irish Open at The K Club**

**Ryder Cup, Adare Manor**

**2025:**

Partnerships with Golf Digest, Golf Channel and Sky Sports (Golf's Greatest Holes)

The 'Best of Ireland' events  
mean the world to my company.

ANGELA NEWMAN  
Hysterical Histories

#Best of Ireland' Sales Mission, Western US

**Global platforms for  
island of Ireland  
businesses**



# Global platforms for island of Ireland businesses

**2025:**  
Facilitate  
**30,000**  
commercial  
meetings

**2025:**  
Support  
**750**  
island of Ireland  
businesses

**Global  
partnerships  
team**





# Win Business Events

New Business Events strategy

Meetings and incentive travel

**2025:**  
Support  
**7,500**  
commercial  
meetings for  
**Business  
Events**





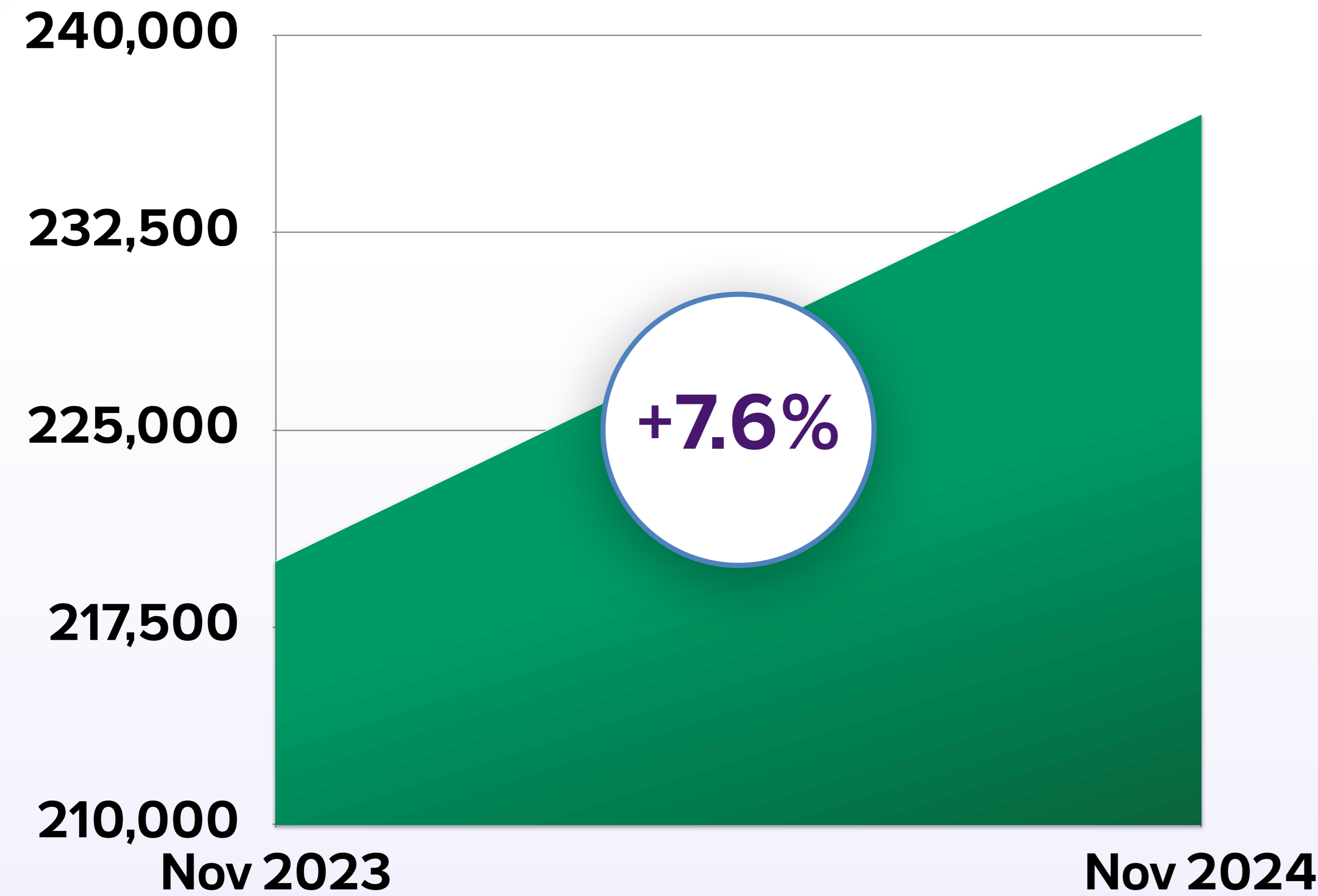
**Paul Kelly**

Chief Executive,  
Fáilte Ireland

# Partnership with Fáilte Ireland

# Growing Tourism Sector

## Registered bedspaces available for tourism



## Attractions and activities on DiscoverIreland.ie



Source: Fáilte Ireland; DCEDIY  
Fáilte Ireland registered bedspaces minus  
Beneficiaries of Temporary Protection  
(BOTP) and International Protection (IP)  
contracted bed stock



# Openings 2024

Queen Maeve Square, Sligo



# Openings 2025

Little Museum of Dublin



# Festivals and Events 2025

## Púca Festival

# Business Events: What we are looking forward to

## New Business Events Strategy:

collaborative approach

delivery of increased value for tourism and beyond



# Business Development and Trade: 2025 Plans

**710 buyer fam trips  
Meitheal, Killarney, 1st-2nd April**



**Support 16,000+  
in-Ireland trade appointments**







Host  
**750**  
international  
media

# Fáilte Ireland: what we do

Destination  
development

Climate Action  
Programme

Digital that  
delivers

Employer  
Excellence

Capability  
building

Domestic  
marketing

EU Just  
Transition

Research and  
Analysis

An aerial photograph of a small, colorful village nestled in a valley. The houses are painted in various bright colors like blue, yellow, red, and green. The village is surrounded by lush green fields and rolling hills. In the background, there are large, rugged mountains with rocky peaks under a clear blue sky. The overall scene is bright and scenic, suggesting a peaceful and vibrant community.

**Alice Mansergh**  
Chief Executive

**Supporting You**



## **Supporting you: ways to work with us**

[www.tourismireland.com](http://www.tourismireland.com)

**Share your photos and stories**

**Join our overseas activities**

**Sign up for ezines and webinars**





# Discover Fanad Lighthouse

**Teaming up together**



# Summary

**Increase Value**

**Economies and Communities**

**Inspiring Visitors**

**Strengthening Partnerships**

**Supporting You**



Tourism Ireland

**MARKETING PLANS**

**Thank you**



Tourism Ireland

**MARKETING PLANS**

**2025**