

Tourism Ireland Business plan 2024

REVISED

NSMC APPROVED (v6.1)

Revised plan

Tourism Ireland's 2024 Business Plan was written late 2023 and approved by the NSMC in June 2024.

During 2024 Tourism Ireland's funding ratio has been restored providing for additional investment in overseas tourism marketing. This revised plan reflects this investment and the associated amplification of marketing impact.

No other changes have been made to the previously approved plan.

Executive Summary

Tourism Ireland has played a key role in supporting industry in its first full year of operation post-Covid, by marketing the island of Ireland effectively overseas to support communities and economies across the island.

Whilst changes to the CSO methodology mean like for like tracking of tourism in 2023 compared to 2019 is not possible, there are positive indicators of demand:

- Air access is tracking above 2019 levels, both overall, and from top revenue and visitor source markets for example the United States and Great Britain.
- Hotel occupancy in 2023 was 102% of 2019 levels, with an average daily rate 32% above pre-pandemic levels.
- Industry sentiment is positive with 62% of industry in Ireland and 44% of industry in Northern Ireland reporting overseas visitors were up year on year compared to 2022 lifting the overall sense of recovery (source: Fáilte Ireland Barometer/Tourism NI's Industry Research).

Tourism Ireland marketed the island of Ireland effectively in 2023 to stimulate demand, and to provide a platform for industry to close sales through:

- Launch of the What Fills My Heart brand campaign, featuring Sharon Horgan and the Derry Girls, on track to create 4 billion 'opportunities to see' for consumers across 16 markets.
- Strong publicity which is on track for 2 billion 'opportunities to see' for the island of Ireland through immersive broadcast media and press, for example a four part series 'Julia Bradbury's Irish Journey' featuring on Channel 4 in Great Britain, 'Ireland with Michael' on PBS in the US and Adrian Dunbar's 'My Ireland' series scaling to Netflix globally.
- Facilitating industry recovery; Tourism Ireland has encouraged over 1,200 island of Ireland industry (including 340 Northern Ireland industry) to engage with in-market activity that helped operators across the island generate business with key incoming tour operators.

Whilst there is positive trading post-Covid, the recovery is not evenly spread and tourism continues to face headwinds. 13% of registered tourism accommodation is no longer available to tourism, as it is under contract for humanitarian purposes (source: Fáilte Ireland). 41% of potential visitors from source markets expect to travel less in 2024 due to their own personal cost of living constraints. The island of Ireland is not seen as a low cost destination by overseas tourists, whilst industry report margin and upward cost pressures, calling into question competitiveness for some visitors.

2024 offers significant opportunity, we have a great product, a committed industry and excellent relationships with trade across the world. We have opportunities to grow value especially outside of the peak season where capacity is ready to be filled and we have exciting and inspiring stories to tell maximising events such as Halloween and the Autumn and Spring seasons they represent.

Restoration of the funding ratio has resulted in a significant increase in Tourism Ireland's impact across the world with real amplification of activity particularly in terms of 2025 kickstart activity.

Tourism Ireland will play a vital role in 2024 to meet these opportunities. Using data driven marketing we will remain nimble, serving the right message to the right audience at the right time. Thus stimulating demand from high value audiences and matching demand to supply.

Strong partnership with Fáilte Ireland and Tourism Northern Ireland is foundational, pairing up product development and overseas marketing capabilities, and collaborating deeply on key workstreams like Home of Halloween, business events and sustainability certification.

2024 Plan Summary:

Increase the value of overseas tourism to the island of Ireland, sustainably supporting economies, communities and the environment; inspiring visitors and strengthening strategic partnerships.

Foster a world class team, demonstrating integrity, living our values and growing expertise.

We will achieve this by further increasing our data led decision making, using our consumer understanding and marketing metrics to present the most compelling and impactful content and measuring the success of our activity. Smart marketing allows us to match supply and demand more effectively, enabling growth.

We will be accountable for the impact of our work with a series of measures and targets that together will build towards our vision in 2024 and beyond.

Objective	Accountability
Increase the value of overseas tourism to the island of Ireland	Increase overseas tourism revenue across the island of Ireland by +5.6% per year on average over the next 6 years to 2030. This will include an increase of +5.5% for Ireland , and +6.5% for Northern Ireland .
Supporting economies and communities	Increase overseas tourism revenue by +6.5% per year on average in Northern Ireland, the regions of Ireland and outside of the peak season, on average over 6 years.
Sustaining environment	With Fáilte Ireland, Tourism Northern Ireland and industry, support the establishment of an umbrella certification , promoting sustainable travel .
Inspiring visitors	Utilise data driven marketing across the consumer journey to win visitors with value adding tourism traits: Awareness – 1.3B ‘opportunities to see’ each year. Consideration – 5% brand uplift among viewers of our content. Research – 8.7M deeply researching on Ireland.com in 2024 with a +12% growth year on year. Advocacy – 7M followers on social in 2024 with a +7% growth year on year.
Strengthening partnerships	B2B events: 25,000 meetings , including 7,500 Business Event meetings, 4,000 golf and luxury meetings. Access – 10:1 return on cooperative marketing investment. Industry – 750 Island of Ireland and 250 Northern Ireland businesses benefit from Tourism Ireland engagement.
World class team demonstrating integrity	Budget rigour and efficiency, +/- 1% budget variance, no priority 1 audit points.
Living our values and growing expertise	Be a Great Place to Work with an annual increase of +8% satisfaction scores based on transparency, coaching culture, performance and careers focus.

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Note:

This document has been written in accordance with the 2024 Business Plan and Cash Grant Guidance. The content is set out to provide (as per section 12 of the guidance):

- A brief review of progress to date against the targets in the 2023-2025 Corporate Plan and the 2023 Business plan including explanations for discrepancy and/or changes – this is outlined in section 1 ‘2023 in Review’ and in detail in the appendices.
- Updated and revised priorities and SMART objectives supported by any relevant targets for 2024. Including the rationale, and linkage to the 2023-25 Corporate Plan, as well as illustrating as appropriate how these objectives support the priorities of sponsor departments – this is outlined in section 2 ‘Priorities for 2024’.
- Activities planned for 2024 to deliver against our objectives with clear and measurable performance targets – this is outlined in section 3 ‘Activity plan’, the performance targets are outlined in section 2 and reiterated in section 8.
- Budgets, resources and grants required for 2024 along with FTE staffing details – this is outlined in section 7 ‘Investing Wisely’ and in the tables contained in the appendices.
- Details on how the plan will be monitored, evaluated and reported on – this is outlined in section 8 ‘Monitoring the plan’.

Due to the nature of Tourism Ireland’s activity, we have three additional sections ‘Delivering around the world’ where we outline our activity within the markets we operate, ‘Additional activity’ where we outline our all-island initiatives and wider workplan and ‘Supporting organisational excellence’ where we outline how we will maintain and develop the organisation to support the delivery of the wider plan.

1. 2023 In review

Tourism Ireland has been active around the world working towards fulfilling our three-year Corporate Plan. While at the time of writing tourism data is not available to assess the revenue generated by overseas tourism, a strong workplan was undertaken. Our work helped build momentum, contributing to economic growth which supports communities, and working towards the minimisation of the environmental impact of inbound tourism.

Main campaign – What Fills My Heart

- A new consumer campaign was launched around the world. Hero assets were created with Irish actor Sharon Horgan and the Derry Girls Saoirse-Monica Jackson and Jamie-Lee O'Donnell telling the world What Fills their Hearts on the island of Ireland.
- The campaign aired on TV in the United States, Great Britain, Germany and France with The Drum, a leading global publisher for the marketing and media industries, recognising the campaign as the best, viewer voted, advertisement on British TV in March 2023.
- The campaign spanned across all activity. It was not limited to Tourism Ireland generated content with the opportunity for journalists, influencers, trade and visitors to expand the campaign and tell the world What Fills their Hearts.

Ensuring sustainability is at the heart of our activity; across all our work we aim to create demand which delivers against **Value Adding Tourism 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

Supporting campaigns

The island of Ireland was front and centre during key moments and events throughout 2023.

- St Patrick's Day provided the opportunity to bring the island of Ireland into the homes of millions of potential visitors. Ireland Week across several European cities provided an opportunity to extend this messaging through on-the-ground activity and related press coverage.
- College Football and the Rugby World Cup provided high profile opportunities for Tourism Ireland to inspire visitors. The most watched College Football game of the season was held in Dublin between Notre-Dame and Navy. Not only did 40,000 Americans visit the island [gov.ie] creating many thousands of advocates and 4 million people watch the game on NBC, but Tourism Ireland was able to maximise the publicity opportunities across the US.
- Media and social campaigns ran across markets positioning the island of Ireland as the Home of Halloween, showcasing the great experiences that await visitors in the autumn and winter season. The campaign delivered almost 190m impressions and 44m completed video views.

Consumer communications

- Tourism Irelands publicity initiatives have supported thousands of seasonality and regionality messages across the world's media. Seven out of ten articles generated by Tourism Ireland's publicity team contained a regional message, three in ten a Northern Ireland message and two in four a seasonality message (as at Q3). Social media and Ireland.com content also included Value-Adding Tourism messages.
- The three-year TV programming fund outlined in the Corporate Plan is establishing long-term opportunities to present the island of Ireland in a longer-form format which lasts the test of time. Adrian Dunbar's Coastal Ireland second season aired throughout early 2023 and is now showing on Netflix (platform of 280 million subscribers).

Northern Ireland

- Northern Ireland was presented across the globe as part of our island of Ireland campaigns including within our hero campaigns where Derry Girls actors were at the core of the campaign.
- Good Vibrations had a five-week run at the Irish Arts Centre in New York, Tourism Ireland used this spotlight on Belfast's music and culture to promote Northern Ireland to US travel professionals and journalists.
- Several projects have promoted the Derry~Londonderry/Donegal area as part of all island initiatives – such as the Channel 4 Derry Girls promotion where stars from the show provide short quips about the area.
- Our Northern Ireland related publicity has a reach of over half a billion.

Facilitating the sale

- As part of the island of Ireland tourism restart, we continued to support industry to access over 155 overseas trade marketing opportunities and drive swifter sales recovery via the Industry Market Access Programme.

Targeting best prospects

- A new consumer segmentation was developed and will be embedded across Tourism Ireland's work during 2024. The segmentation has been built with input from 13,000 potential visitors across the island of Ireland's main markets. Target segments were chosen based on their ability to deliver against the Value Adding Tourism Traits.
- An assessment of the way Tourism Ireland promotes the island of Ireland in Emerging Markets (those markets outside of Great Britain, Mainland Europe, North America and Australasia) was undertaken. The assessment was built around the sustainability priorities outlined in the Corporate Plan.

Measuring success

Tourism Ireland set out a range of measurement targets in both the Corporate and annual Business Plans. During 2023, Tourism Ireland has made significant progress against the 2023-2025 Corporate Plan Indicators and achieved most of the 2023 Business Plan indicators. Appendix B and C outline progress against each target.

Volume and value visitor statistics

Several targets rely on official tourism volume and value estimates provided by the Central Statistics Office (CSO) in Ireland and the Northern Ireland Statistics and Research Agency (NISRA). COVID-19 created a break in the timeseries as interviewers were unable to gather the data at the island's air and sea ports.

During the break the CSO updated their methodology. The new methodology provides a number of enhancements; however, the CSO have advised that the two datasets (pre and post-pandemic) are not comparable. It is therefore now not possible to assess progress against the targets set on the old data series. During 2024, Tourism Ireland will work with Fáilte Ireland and Tourism Northern Ireland to agree a new baseline level from which new targets (outlined later within this document) will be set and evaluated.

2. Priorities for 2024

The 2023-2025 Corporate Plan sets out a clear ambition in line with Tourism Ireland's mandate *"to increase tourism to the island of Ireland, and to support Northern Ireland to realise its tourism potential"*.

The Corporate Plan also confirmed our purpose, developed for the previous Corporate Plan, continues to hold true: *"through tourism, enable communities to prosper, improving quality of life throughout the island of Ireland"* and the plan reaffirmed the Tourism Ireland's Board vision to *"create a place where sustainable tourism thrives"*.

2024 is the second year of the Corporate Plan and the organisation will set out to inspire visitors in support of the plan's ambition.

Context

Tourism across the island of Ireland has seen its first full year of trading following the pandemic. Industry report a strong year for overseas business with many operators above their pre-pandemic trading levels. Access across the island of Ireland is strong, with more air seats coming into the island than in 2019, and hotels maintaining high occupancy rates and robust average daily rates.

There are however, challenges impacting tourism to the island of Ireland and also around the world. 2024 looks set to retain the environment of significant risk. Issues such as supply constraints, macro-economic instability and potential security risks in the shadow of current conflicts around the world on planning holidays in 2024.

In the pre-COVID era it would have been unprecedented for the industry to be exposed to the large number and variety of high impact risks that exist today. These risks play a large role in Tourism Ireland's plans for 2024 and beyond. Our activity needs to remain flexible and agile to face the changing environment of the future.



Tourism Ireland will work to mitigate these challenges as we shape demand to fill available capacity right across the island and throughout the year. Through enhanced consumer targeting and messaging we will win the hearts and minds of potential visitors and grow the value of tourism to the island of Ireland.

Approach to 2024

As we move forward into 2024, the Tourism Ireland team will build on our mandate and purpose with a new vision to inspire visitors. We will:

Increase the value of overseas tourism to the island of Ireland, sustainably supporting economies, communities and the environment; inspiring visitors and strengthening strategic partnerships.

Foster a world class team, demonstrating integrity, living our value and growing expertise.

We will achieve this by further increasing our data led decision making, using our consumer understanding and marketing metrics to present the most compelling and impactful content and measuring the success of our activity.

We will be accountable for the impact of our work with a series of measures and targets that together will build towards monitoring our marketing effectiveness.

This section of the business plan outlines where this vision has resulted in refinement of Corporate Plan indicators and how the 2024 Business Plan indicators align to measure success across each aspect of the vision for 2024 and beyond.

Increase the value of overseas tourism to the island of Ireland (BPI 1)

Tourism Ireland will align our targets with government policy and wherever possible with our sister agencies. Over the rest of the decade, we will target an annual average of +5.6% growth in tourism revenue to the island of Ireland.

For Ireland, the growth will be +5.5%. This target has been built considering sustainability objectives. Revenue growth will be in-excess of inflation and will be achieved through an increase in bed nights and spend per bed night; thus increasing the value of tourism ahead of tourist numbers.

For Northern Ireland, a higher growth target of +6.5% will reflect the ambitions of the Department for Economy, Tourism Northern Ireland and the industry in Northern Ireland. The higher target will also reflect the greater capacity available and our mandate to support Northern Ireland to realise its tourism potential.

Our plans and ability to hit this long-term target relies on continued investment in tourism promotion and development.

As noted, due to a change in methodology in the collection of visitor value estimates, several of Tourism Ireland's Corporate Plan targets are no longer measurable. To address this issue, Tourism Ireland will replace these measures by the targets outlined below.

Revised Corporate Plan Target (CPI 1 & 6)	In line with our goal to grow inbound tourism revenue on average by +5.6% per annum out to 2030, we will target this same average growth over the remaining life of this Corporate Plan.
2024 Business Plan Target BPI 1	Working with Fáilte Ireland, Tourism Northern Ireland, the CSO and NISRA agree a baseline for inbound tourism revenue to the island of Ireland and Northern Ireland by end of 2024. In line with our goal to grow inbound tourism revenue on average by +5.6% per annum out to 2030, we will target this same growth level in 2024.

Note: a change has been made towards all tourism revenue rather than holiday revenue. This is to allow for further alignment between Tourism Ireland and Fáilte Ireland/Tourism Northern Ireland and to reflect Tourism Ireland's widening remit to include meeting and incentive promotions.

Note: the data used to measure the value of tourism will continue to be the official CSO and NISRA statistics, the agreement referred to above relates to detailed mechanics of amalgamating the figures across the whole island of Ireland.

Note: there are many factors that affect annual trends in inbound tourism revenue to the island of Ireland many beyond the control of Tourism Ireland. To address this, our targets in this area are long-term – average annual growth to 2030.

Note: financial targets include growth through additional spend, nights and inflation.

Supporting economies and communities (BPI 2)

A key element of Tourism Ireland's Corporate Plan is to ensure growth is delivered sustainably. Spreading the benefits of inbound tourism for industry, communities and the economy across the whole island and throughout the year is a key element of achieving our vision. To this end, Tourism Ireland has established within the Corporate Plan a set of Value Adding Tourism Traits which will guide our marketing activity during 2024.

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*

We will use data to inspire visitors through engaging and impactful messaging. Attracting those that are spending more, staying longer across the whole island (including Northern Ireland and the regions of Ireland), and those whose visit will have a lower environmental impact.

Targets will be set to reflect this ambition.

Revised Corporate Plan Target (CPI 2, 3 & 4)	<p>In line with our long-term annual average growth goals for inbound tourism to 2030:</p> <p>Inbound tourism revenue for the remainder of the Corporate Plan will target growth for Northern Ireland and the regions of Ireland (outside of Dublin) of an average of +6.5% per annum.</p> <p>Inbound tourism revenue on the island of Ireland in October to May to grow by an average of +6.5% per annum for the remainder of the Corporate Plan.</p>
2024 Business Plan Target BPI 2	<p>Agree a baseline for inbound tourism revenue for Northern Ireland with Tourism Northern Ireland, and the regions of Ireland (outside of Dublin) with Fáilte Ireland.</p> <p>Work with Fáilte Ireland and Tourism Northern Ireland to agree a baseline for out-of-peak inbound tourism revenues (October-May) by end of 2024.</p> <p>In line with our long-term annual average growth goals for inbound tourism to 2030:</p> <p>Inbound tourism revenue for 2024 will target growth for Northern Ireland and the regions of Ireland (outside of Dublin) of +6.5%.</p> <p>Inbound tourism revenue on the island of Ireland in October to May will be targeted to grow in 2024 by +6.5%.</p>

Note: the seasonal Corporate Plan target has changed from a shoulder to off-peak period measure. This is to align with our sister agencies and to recognise the opportunity that exists throughout the whole year.

Note: the data used to measure the value of tourism will continue to be the official CSO, NISRA and Fáilte Ireland's Survey of Overseas Travellers statistics; the agreement referred to above relates to detailed mechanics of amalgamating the figures across the whole island of Ireland.

Note: there are many factors that affect annual trends in inbound tourism revenue to the island of Ireland many beyond the control of Tourism Ireland. To address this, our targets in this area are long-term – average annual growth to 2030.

Note: NISRA are likely to produce quarterly estimates for revenues, we will pro-rata Northern Ireland quarterly data to create an estimate of October – May.

Sustaining environment (BPI 3)

As outlined in the Corporate Plan, Tourism Ireland has been developing with Fáilte Ireland and Tourism Northern Ireland an all island certification programme. In 2023 the approach will be agreed and in 2024 the industry and consumer communications design and marketing will begin.

2024 Business Plan Target BPI 3	Working with Fáilte Ireland and Tourism Northern Ireland design and implement a communications plan for industry, trade and consumers for the all-island certification and put in place a strategy to prioritise certified industry across Tourism Ireland's work.
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Inspiring Visitors (BPI 4, 5, 6 and 7)

We will increasingly use data to hone our messaging and ensure maximum cut-through and impact. Tourism Ireland does not own the commercial transaction – industry across the island of Ireland make the sale. However, Tourism Ireland plays a vital role stimulating demand and supporting desirability of the island of Ireland as a tourism destination, influencing consumers across the purchase funnel from awareness to consideration, research and advocacy.

2024 Business Plan Target BPI 4A	Awareness: 1.3 billion quality audio visual 'opportunities to see' across all consumer marketing (excluding static display ads) in 2024
2024 Business Plan Target BPI 4B	Awareness: Deliver 1.545 billion quality 'opportunities to see' through publicity (in Tier 1 Media), 500m of which will feature Northern Ireland.
2024 Business Plan Target BPI 5	Consideration: Achieve an average 5% brand uplift in those who have seen Tourism Ireland campaign materials compared to those who have not. Brand uplift measures the impact of our advertising in driving recall and consideration of the island of Ireland as a destination. Measured via Brand Uplift Studies of all campaigns with a spend over €100k.
2024 Business Plan Target BPI 6	Research: 8.7 million people will research the island of Ireland on Ireland.com during 2024, a +12% increase year over year. Measured by Net Usable Web Visits.
2024 Business Plan Target BPI 7	Advocacy: Increase the number of followers on Tourism Ireland's social media channels to 7 million by the end of 2024 an increase of +7% year over year.

*Note: BPI4 resembles the 2023 BPI6, however in 2024 we will **only** measure audio-visual content – for example, no banner or static display advertising. This will focus the target on the most inspiring and effective content.*

Note: BPI6 mirrors the 2023 BPI13, due to the reasons outlined earlier the target for 2023 was not met, the target for 2024 is an up-lift on the achieved NUWV level.

Strengthening partnerships (BPI 8, 9 and 10)

The commercial relationship is held by industry on the island of Ireland and trade overseas. Tourism Ireland plays an important role bringing industry to market:

- through our overseas platforms where they can meet directly with buyers,
- through engagement in our consumer and publicity activities, and
- through co-operative consumer campaigns in market.

2024 Business Plan Target BPI 8	B2B events: Support 25,000 meetings between industry and trade throughout 2024, including 7,500 Business Events' meetings and 4,000 Golf and Luxury meetings.
2024 Business Plan Target BPI 9	Co-operative campaigns: All co-operative campaigns to achieve a 10:1 return on Tourism Ireland's investment.
2024 Business Plan Target BPI 10	Industry engagement: During 2024 at least 750 island of Ireland businesses, including 250 from Northern Ireland to benefit from Tourism Ireland engagement.

*Note: BPI10 resembles 2023 BPI13/13A however in 2024 we will deduplicate businesses working with Tourism Ireland in multiple markets – ie in 2024 the target refers to **unique** businesses.*

World class team demonstrating integrity (BPI 11)

The Tourism Ireland team around the world are fundamental to our success and our ability to support industry across the island of Ireland. To do this, our team work to high levels of integrity and accountability.

An updated and comprehensive awareness programme will be conducted covering, financial propriety, risk management and public perceptions on use of public funds.

2024 Business Plan Target BPI 11	Budget rigour and efficiency: the 2024 accounts will be unqualified with no priority 1 audit findings and administer expenditure in line with +/- 1% maximum unplanned or forecast variance threshold.
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Living our values and growing expertise (BPI 12)

Tourism Ireland relies on high performing teams. In return we want to create a great place to work and invest in coaching and growing expertise. In line with our Corporate Plan goals, we will use the Great Places to Work survey to ensure our team have high levels of trust.

2024 Business Plan Target BPI 12	Achieve Great Places to Work certification again in 2024, with an increase in average satisfaction by +8 percentage points on 2023.
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We do not support the industry, communities and the economy alone, we work with a wide range of industry and other stakeholders across government in Ireland and Northern Ireland and our sister agencies to ensure the island of Ireland inspires visitors across the world.

3. Activity plan

Our work during 2024 will support the Corporate Plan ambitions by *increasing the value of overseas tourism to the island of Ireland, sustainably supporting economies, communities and the environment; inspiring visitors and strengthening strategic partnerships.*

The restoration of funding ratios has resulting in Tourism Ireland's ability to significant impact in these 2024 plans.

Supporting economies and communities

Northern Ireland focus

Northern Ireland will continue to be promoted as an integral part of island of Ireland campaigns and through a range of dedicated Northern Ireland activity. In order to support Northern Ireland to meet its tourism potential, additional activity will focus on the great experiences available across Northern Ireland. This will include:

- **At least 6,000 articles across overseas media focusing on the great experiences in Northern Ireland.**
- In Great Britain and cities in Europe with direct access, additional activity will be undertaken with a **co-operative marketing burst early in the year** to ensure Northern Ireland features in trip planning. *Note, this will be funded by jurisdictional specific investment from the Northern Ireland Executive.*
- **Increased cross-selling opportunities** especially to those actively researching the island on Ireland.com – this will use passion point and related hooks to suggest Northern Ireland activity as part of an island of Ireland experience
- A focus on **promoting Northern Ireland for business meetings and incentives** as part of our Business Events programme.

Encouraging regional spread

The regions of Ireland are likely to have particular capacity challenges during 2024 due to accommodation constraints related primarily to the war in Ukraine. The regional aspirations of our plan need to be cognisant of this reality so as not to create demand out of line with supply. **During 2024, we will work with Fáilte Ireland and Tourism Northern Ireland to align on a view of capacity and identify areas where promotion will be beneficial.**

We will promote these areas throughout our channels, particularly using **cross-selling opportunities within Ireland.com** so that those researching today's most visited attractions to also see nearby hidden gems, winning bed nights.

Throughout our publicity and social activity we will aim to further **highlight these less visited areas to expand the island of Ireland visitor bucket list** using testing to identify the next highly appealing potential attractions that can scale.

Seasonal landmark moments

Extending the season offers the opportunity to increase the revenue returned from inbound tourism without adding to risks of overcrowding and enabling people across the island of Ireland to have high quality jobs in tourism throughout the whole year.

The island of Ireland has a wealth of seasonal stories to tell. **St Patrick's Day heralds in the spring**, providing opportunities to promote the Season of Green. The island of Ireland as the **Home of Halloween enables rich storytelling of the autumn and winter experiences.** Tradfest and Belfast 2024 support the message of an easy to fill, vibrant break throughout the whole year.

Tourism Ireland will make these seasonal events into landmark moments, telling the story and the benefits of off-peak travel. This will be supported by significant autumn campaigns to boost September to February travel across the top 10 markets.

Supporting economics and communities – 2024 specific activity:

Northern Ireland focus

Deliver year 2 outputs of Shared Island WAW/ CCR project including developing look and feel of the project and delivering market specific campaign. Identify and develop further bids to Shared Island where appropriate.

Work with TNI and FI to develop and submit **Peace Plus bid** to support the strategic development of tourism in Northern Ireland.

Continue to **highlight Northern Ireland's attractions**, key cities and experiences.

Work with partners to identify opportunities to **deliver special events in market** that support the overall positioning of contemporary/innovative Northern Ireland and the tourism offer.

Provide a greater focus on the **promotion of the golf product** in advance of The Open at Royal Portrush in 2025. Additionally, campaigns around the AMGN Irish Open at Royal County Down designed to build additional golf business from September to May. Utilise this platform to promote the world class golf product throughout Northern Ireland.

Encourage and support Northern Ireland industry partners in maintaining their increased participation in **Tourism Ireland's overseas marketing platforms**.

Continue to work with local councils and TNI to ensure international tourism is embedded as a focus in the development of all **City/Region tourism projects**.

Encouraging regional spread and building seasonal landmark moments

A significant investment will be made in the **Home of Halloween** campaign. This will be a joined up campaign with Fáilte Ireland and Tourism Northern Ireland based on consumer research to tell the story of autumn. Activity will span the top-12 markets including broadcast initiatives, in-market activations, and industry platforms along with media spend in close to home markets.

A campaign for **St Patrick's Day 2024** will be developed, including content that can also be used for Ireland Week activity in Italy, Spain and The Netherlands.

Increasing the **diversity, equality and inclusion** of message will continue.

Our publicity work will continue to focus on regional and seasonal messaging in line with our Value Adding Tourism Traits.

Media and trade fam trips will be focus on the regions and with seasonal messaging.

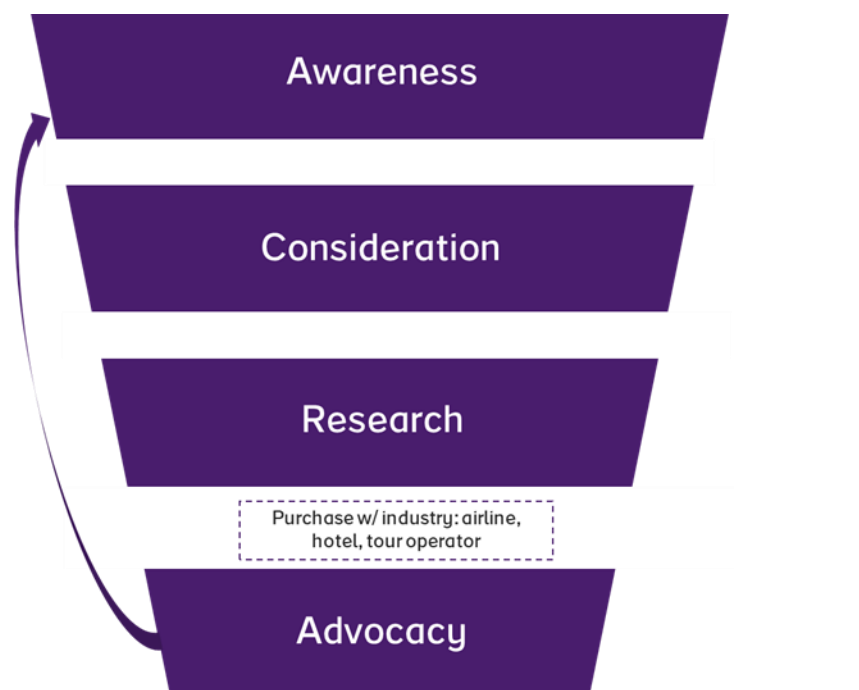
The successful **market twinning programme** will continue for the third year, bringing markets ever closer to key regional destinations across the island of Ireland.

The **three-year TV programming fund** outlined in the Corporate Plan will continue to invest in long-form content that promotes the whole island.

The **Innovation fund** established in 2023 to enable Tourism Ireland to take advantage of opportunities that identify themselves during the year will be maintained.

Inspiring visitors

Tourism Ireland does not hold the commercial relationship between industry and the consumer, but we do vital work across the consumer purchase funnel, inspiring people to consider, research, visit and advocate for the island of Ireland.



Awareness

While most people in our source markets are aware you can visit the island of Ireland, not all have the island of Ireland front and centre in their consideration set. Tourism Ireland plays a vital role in increasing the population of people actively thinking about visiting.

Our campaigns are designed to bring the island of Ireland to the centre of consumers thought processes. Working at the top of the funnel to ensure we are in the mix and positively considered.

During 2024, we will ensure 1.3 billion qualified audio visual opportunities to see Fill Your Heart With Ireland content across our markets with at least 22,000 press and broadcast pieces of content focused on value adding tourism trait experiences across the island.

Consideration

It is not enough to simply think about visiting on the island of Ireland however, we need consumers to seriously consider it and start to be excited by the great experiences they will have.

Our campaigns, including traditional media, social, publicity and influencer all aim to increase consideration by presenting high quality, engaging content showcasing a range of experiences across the whole island.

During 2024 we will increasingly use data led marketing techniques to ensure our messaging and creative has the greatest impact. **On all campaigns with an investment above €100k, brand uplift studies will be utilised.** These studies will consider the impact of the campaign, identifying how effective they are in increasing consideration of the island. **On average, we will seek to have at least a 5% increase in brand uplift (including ad recall, consideration) amongst those seeing our campaigns than those that don't.**

Further testing of campaign creative will be undertaken as we innovate the messages we use basis, honing our approach to ensure the best, most inspiring content is working hard for the island of Ireland.

Research

In line with our Corporate Plan ambitions and sustainability/Value Adding Tourism Traits, we will increasingly signpost Ireland.com as the shop-window to research a visit to the island of Ireland. Through our own communications and search optimisation, **we will entice 11.3 million consumers to visit Ireland.com during 2024 interacting and researching the island.**

Ireland.com has a range of innovative **cross-selling features which will be enhanced further during 2024.** The site can encourage visitors researching iconic 'most visited' locations to also consider nearby hidden gems as part of their trip, e.g. showcasing the Aran islands, Aillwee caves and traditional music in Doolin for visitors researching the Cliffs of Moher. Using cross-sell techniques, we can encourage regional bed nights.

Advocacy

The island of Ireland is a wonderful place to visit, a fact already recognised by millions of people who follow Tourism Ireland generated content across social media. By using an innovative data-led approach to identify visuals and themes which are most appealing and have the greatest impact on advocacy, we will **increase our followers by 7% during 2024.** Through this medium we will not only regularly communicate the island of Ireland message to the 7 million people following us by the end of the year, but also to their networks too, such that our followers' advocacy feeds into awareness and consideration amongst new audiences.

Inspiring visitors – 2024 specific activity:

- The **Fill Your Heart Campaign** will be expanded with content focused on passion points (e.g. built heritage, soft adventure, views and landscapes), and enhanced Wild Atlantic Way content in support of its 10th anniversary.
- The brand campaign informs much of Tourism Ireland's marketing activity. Depending on specific market plans and funding, it is carried on television, video on demand, social, out-of-home and print media and is reflected across Ireland.com.
- Significant autumn and 2025 kick start campaigns will help promote season extension.
- Tourism Ireland's **new inbound customer segmentation model** will be used to inform future brand creative in order to cement the brand's appeal to our best audience targets.
- A **sentiment tracker** will be established to understand consumers impressions of the island of Ireland along with the wider purchase funnel position in key markets.
- Tourism Ireland's **creative agency contract** is in the process of being retendered. The successful agency/agencies will input to our inspirational messaging throughout 2024.
- **Media metrics** will inform the content used across Tourism Ireland's communications. An example of this is brand uplift studies which will be undertaken on all social and digital campaigns with a market spend of €100k or more.
- A greater focus on **driving traffic towards Ireland.com** will lead to increased volume of consumers utilising the site for research.
- Ireland.com's ability to **cross-sell** different aspects of a visit, particularly hidden gems will be enhanced.
- Market opportunities will be used to inspire visitors across the world such as the Zeitgeist Irland 24, a season of Irish arts and culture in Germany throughout the year.

Media buys

- We will utilise the **AI driven buying solutions** of the major media platforms to target our campaigns dynamically at the most appropriate audiences.
- We will ensure other **media buys are accurate, purposeful and efficient** through the rigorous, detailed analysis of Martech on trafficking, optimisation, reporting and insights.
- Search and PCS costs have been halved since their COVID peak due to Tourism Ireland's digital optimisation work. During 2024, we will continue to use effectiveness data to buy accurately and maintain the reduced cost levels.
- We will prepare for the **2025 media contract re-tender**, ensuring current activity is portable in order to allow for a full competition of the media agency contract during

Innovating our approach in 2024

- We will partner with the digital platforms to apply AI best practice to audience identification and targeting.
- Our new consumer segmentation will enable us to create content to inspire the most sustainable audiences.
- The Nordics market team are leading a test to determine if markets outside the top four may approach media buying and consumer campaigns in a more agile way. We will use the findings as part of our planning for 2025 and beyond.

Strengthening partnerships

Tourism Ireland connects industry across the island of Ireland to trade and consumers overseas. This is achieved through overseas sales platforms, cooperative campaigns and Business Events promotion.

B2B Partnerships

Sales platforms provide an opportunity for island of Ireland industry to sell directly to overseas trade. They provide an efficient and engaging way for both seller and buyer to meet and do business. Tourism Ireland is well known for this activity in market and receives exceptionally high support from industry and buyers alike.

We will continue to invest in this activity **facilitating at least 25,000 sales meetings during 2024. 4,000 meetings will be specifically with golf and luxury operators**, through events such as ILTM in Cannes and the International Golf Tourism Market (IGTM).

B2B partners also engage with Tourism Ireland in co-operatively funded marketing campaigns across the world. These offer an opportunity for Tourism Ireland and the industry or trade partners to extend the reach of a campaign by working together. We will continue to undertake this work during 2024 including activity focused on Northern Ireland and regional opportunities to drive November to February business. **Where we invest in co-operatively funded activity, we will look to achieve at least a 10:1 return on our investment.**

Business events

During 2024 Tourism Ireland will assume responsibility for promotion of meetings and incentives within Business Events– the promotion of meetings incentives and experience travel across the island of Ireland. Within this remit **we will facilitate at least 7,500 sales meetings with Business Events industry and trade**, including at the three largest international events IMEX Las Vegas, IMEX Frankfurt and IBTM in Barcelona.

Working with Fáilte Ireland, Tourism Northern Ireland, industry and other stakeholders **a full Business Events strategy will be developed during 2024.** *Note: some but not all of the funding for Business Events is jurisdictional specific.*

Access

Access has been a significant success for the island of Ireland during 2023, and we will continue to take advantage of new and existing routes such as the three additional gateways from the United States.

Access partners (airlines and ferry operators) invest heavily across the island of Ireland's source markets. They offer an opportunity for Tourism Ireland to bring engaging imagery and campaign messages to consumers alongside compelling fares and offers. *Note: access co-operative investment is primarily (but not exclusively) undertaken with jurisdictional specific funding.*

The Corporate Plan sets out our engagement approach with access partners which will continue throughout 2024 to ensure our activity brings incremental visitors to the island of Ireland in line with Value Adding Tourism Traits. Where we do invest with an access partner we will look to **achieve a 10:1 return on our investment.**

Additionally, we will invest in **point-to-point campaigns in-market where a strategically important route may need demand creation.** In these cases we will promote the great access from the origin point to the island of Ireland identifying all carriers operating on the route.

Industry

Industry across the island of Ireland have various opportunities to engage with Tourism Ireland either in market, or with consumer promotions. **We will continue to encourage the widest range of industry to be involved with our programmes and have set a target of at least 750 unique industry, 250 of which from Northern Ireland to engage with us during 2024.**

Strengthening partnerships – 2024 specific activity:

Business Partnerships

- As the industry moves into a new phase of rebuild following COVID-19, the **Industry Marketing Access Programme** is no longer the most effective way to support industry. It will therefore be withdrawn in 2024.
- Funds will remain 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).
- **Trade events:** During 2023 an independent evaluation of the top 20 fairs, workshops and events around the world took place. Once the learnings from this review are known (findings available early 2024) they will be used to ensure the 2024 programme is as effective as possible.
- The Corporate Plan established the need for a standardised **key account management (KAM) framework** which has now been created. The KAM identifies the most valuable trade for the island of Ireland across the world including their role in bringing visitors that align with the Value Adding Tourism Traits. The KAM will be fully embedded throughout 2024 and will be used to ensure that capacity and pricing issues reported by trade will be managed to maintain long-term interest and intent to programme the island of Ireland.
- An **Air Canada, United Airlines sales blitz** will bring 30 top selling Europe agents to the island of Ireland from North America to experience the world class product with an expected return on investment of 11:1.
- **Industry offers:** Tourism Ireland's digital footprint provides a great opportunity for the island of Ireland's tourism industry to place offers and experiences in front of millions of prospective visitors. Offers have been presented throughout 2023 and this will continue throughout 2024.
- **Golf and luxury:** A particular opportunity for the island of Ireland exists around golf and luxury product and trade promotion. 2024 will be a big year for golf as we prepare for The Open 2025 and the Ryder Cup in 2027. Promotion and trade activity will increase during 2024 to prepare for these opportunities. The new business to business luxury proposition "Ireland where luxury comes naturally" will help to keep the island of Ireland front of mind in the luxury trade overseas.

Business Events

- In 2024, Tourism Ireland will take over the management and operation of the three major international meetings, incentives and event conferences - **IMEX Frankfurt, IMEX Las Vegas and IBTM in Barcelona**.
- We will facilitate at least 7,500 business events sales opportunities, expanding beyond the three core conferences.
- A full tri-agency plan for Business Events promotion will be developed during Q1 2024. Based on this, we will develop a strategy and action plan to increase our activity across established markets where the best opportunity lies.

Innovating our approach in 2024

- We will apply key account management and impact tracking to events to ensure we maximise our effectiveness.
- We will adapt events based on industry feedback and effectiveness data.

Sustaining the environment

All island certification assurance scheme

Throughout 2023 Fáilte Ireland, Tourism Northern Ireland and Tourism Ireland have been working on an all-island certification assurance scheme. The scheme will see industry across the island who have appropriate certification from a third party able to apply for an all-island mark and recognition by the tourism agencies.

During 2024, Tourism Ireland will play an important role in the development of the consumer facing messaging and branding of the scheme. This will include **consumer research, brand and mark development and a roll-out campaign all in conjunction with our sister agencies.**

The scheme will be promoted to industry throughout 2024 by Fáilte Ireland and Tourism Northern Ireland and **Tourism Ireland will promote the scheme to overseas trade.**

By the end of 2024, Tourism Ireland will also have a plan in place to **prioritise industry with certification across our activity from the beginning of 2025** to strengthen the island of Ireland sustainability brand.

Sustainable travel and experiences

Significant investment is being made in more environmentally sustainable tourism product by Fáilte Ireland, Tourism Northern Ireland and industry. Where this has an international appeal, Tourism Ireland will ensure that it is promoted to consumers and trade overseas. Lower carbon itineraries will increasingly feature in our communications and on Ireland.com as will sea routes where a lower environmental footprint is possible.

We will take an agile approach to global partnerships based on the environmental impact and revenue generating benefits to the economies and communities on the island. This extension of the revenue per carbon footprint approach used in the Emerging Markets Assessment will increasingly guide our decisions.

Tourism Ireland as a Good Citizen

Tourism Ireland needs to be authentic if it is to truly deliver on policy objectives. As an organisation we will aspire to be carbon neutral by 2030. Activity plans will be developed in 2024 to enable this ambition to be achieved.

Sustaining the environment – 2024 specific activity

Tourism Ireland has developed guidance around Valued Adding Tourism Traits to enable the delivery of sustainable demand in line with our strategic ambition. In 2024 the focus will be placed on making tangible progress across each of the following eight levers.

- **Policy Direction:** Engaged with sponsor departments regarding policy development.
 - **Message:** Tourism traits compliance for all marketing activity
 - **Audience:** Identify and target warm audiences
 - **Markets:** Apply sustainability criteria when deciding on source of business to pursue.
 - **Promoted Product:** Engaged in development of and roll out of all island certification. Give greater prominence to industry who meet sustainability criteria.
 - **Voice of Consumer:** Track, anticipate, inform on the changing importance of sustainability amongst our target consumers.
 - **Training/Embedding:** On going focus, support for all staff to be best in class.
 - **Net Zero:** Develop a business case for net zero marketing
- Accountability for the delivery against each lever is clearly allocated across the business.

A programme to work towards Tourism Ireland itself becoming carbon neutral by 2030 will be also be developed.

Innovating our approach in 2024

- We will weigh the carbon footprint of tourism versus the revenue value it achieves in line with the VATTs in assessment of priority segments and markets
- We will fully embrace the opportunities afforded by the all-island sustainable certifications – as the island of Ireland becomes one of the few destinations around the world to have such a scheme.
- We will promote sustainable ways to experience the island through our work making full use of the new and exciting product available for visitors to enjoy across the whole of the island of Ireland.

4. Delivering around the world

Tourism Ireland will continue to work around the world to encourage people to visit the island of Ireland and to do so in line with the Value Adding Tourism Traits.

Mainland Europe Appraisal

An appraisal of how we can best capitalise on the opportunities for the island of Ireland across Mainland Europe will be undertaken in 2024. A formal terms of reference will be established for the appraisal which will cover the scope and timeline of the work.

The appraisal will include:

- Where the most fruitful opportunities lie
- How best to unlock opportunities
- Assessment of how best to achieve our Value Adding Tourism Trait goals
- Full review of activity across Mainland Europe

Emerging Markets Assessment

An assessment of operations and activity across Emerging Markets was undertaken during 2023. The assessment took into account the economic, social and environmental opportunities and costs of operating in Emerging Markets.

Based on the assessment's findings, Tourism Ireland will not undertake proactive marketing or sales activity in Emerging Markets during 2024.

The assessment did however identify that a range of limited but lucrative opportunities may exist in Emerging Markets and in 2024 Tourism Ireland will support opportunities if the economic benefit outweighs the environmental impact or has a wider international or governmental benefit.

Global Business Development Team

A Global Business Development Team will be established. The remit of the team will be to review and pre-qualify opportunities from markets where Tourism Ireland doesn't have a presence through an Opportunity Business Case, to ensure they meet the agreed criteria.

Global Inbound operators, who attract business to the island of Ireland from multiple markets, will be managed under this team with a reprioritised focus on established markets.

5. Tourism policy and strategy

Tourism Ireland will continue to work with both departments in the development and deployment of tourism policy. Tourism Ireland's Corporate Plan 2023-2025 will act as a valuable input to the plan developments.

In 2023, Tourism Ireland has supported the Department for the Economy in Northern Ireland with the development of its Tourism Strategy. Tourism Ireland will work to support the plan throughout 2024 and beyond once it is finalised.

Tourism Ireland will continue to work with the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media in Ireland in developing and embedding its new Tourism Policy.

Tourism Ireland will continue to support the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media and the Department for the Economy in creating the environment for enhanced co-operation to deliver against shared Tourism ambitions.

6. Supporting organisational excellence

Our vision for 2024 and beyond has our team at its heart. Reflecting this, we will *foster a world class team, demonstrating integrity, living our value and growing expertise.*

Demonstrating integrity

We will ensure that we demonstrate high levels of responsibility and accountability across our work, especially in relation to financial integrity. **We will ensure that the 2024 accounts will be unqualified with no priority 1 audit findings and that our expenditure is administered in line with +/- 1% maximum unplanned or forecast variance threshold.**

As part of this, we will refresh our financial guidelines reflecting perceptions around the use of public funds.

During 2024 we will deploy a comprehensive programme to ensure that we continue to comply with both the actual and spirit of GDPR requirements and guidance.

Living our values

Tourism Ireland has an established set of values around **respect, collaboration, ownership and creativity**. During 2024 we will work to further embed these within all our work to ensure we live our values and create a great employee experience.

We will work to **build our levels of trust amongst our teams**, seeking year on year improvements via the Great Places to Work survey.

We will **enhance our leadership skills** across the organisation focusing on collaboration and transparency of decision making and that decisions, practices and information is appropriately communicated to all.

In line with our Diversity and Inclusion aspirations set out in the Corporate Plan, we will foster a **diverse, equitable and inclusive workplace that embraces strength in difference and ensures fair treatment for all.**

Growing expertise

Our team are behind all our successes and it is important that every member of Tourism Ireland have the opportunity to grow their expertise and career. We will achieve this through a coaching culture, upskilling managers to ensure they can work to increase team satisfaction and performance. Every team member will:

- By the end of January 2024 have personal goals aligned to this business plan,
- Benefit from transparent mid and end of year performance discussions, and
- have a personalised career development plan.

Facilitating our work

Our Corporate Communications team will continue to support government, industry and the community through effective communications of the benefits of inbound tourism to the island.

Our IT infrastructure and data security teams will continue to provide the required equipment, networks and security to ensure effective and efficient work can be undertaken in our complex multi-country environment. Data protection and procurement will be effectively managed to ensure we abide by best practice.

The Sustainability Forum established in 2023 will oversee our sustainability working practices across all our work and ensure we achieve our 'Working Towards a Sustainable Future' plan. Progress in this area will be reported quarterly to the Tourism Ireland board.

As part of this work, the team will investigate whether it is possible to achieve our aim of becoming carbon neutral by 2030, if so, activity plans will be developed in 2024 to enable this ambition to be achieved.

Supporting organisational excellence – 2024 specific activity:

Human resources

- Continue to invest in our people development through a **robust Learning and Development programme**
- **Refine the organisational structure** and implement a resourcing strategy to support this
- Continue to establish an operational balance between remote work and in office collaboration and team development
- Support the ongoing development of the **ESG capability** across the organisation
- Further development of the **2024 Global Internship programme**
- Continue to enhance functionality of all HR systems
- Enhance the employee experience with a comprehensive **internal communications plan**

Information communication technology

- Continue to **invest in appropriate IT improvements** and developments in systems, websites and infrastructure to ensure we can deliver the activity outlined while accommodating a blend of work-from-home and in-office working.
- Continued **move of infrastructure and systems to the cloud** from on-premise ensuring the improved sustainability of our IT Estate
- Ongoing **IT security work** to ensure the business is adequately protected
- Ongoing **GDPR work** to align with new GDPR Controls Framework
- Continued **Business Continuity Plan** review, communication and testing
- Continued Roll-out of PowerBI for organisational reporting

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.
- 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.
- Maintain the risk register and manage both internal and external auditors.

Good Governance

- Maintain regulatory compliance.
- Ensure a culture of openness and transparency.
- Support the Board in delivering against their responsibility.
- Deploy/Implement the finding of the **2023 Board Effectiveness Action Plan**.

7. Investing wisely

The available budget for 2024 at the time of writing is:

Investment €m's	2023	2024
Operating Costs	27.5	29.7
Marketing Core	43.6	48.6
Capital	7.0	7.4
Total	78.1	85.7
Funding	2023	2024
TCAGSM	63.2	64.0
DfE	14.9	21.7
Total	78.1	85.7

Planned Core Marketing Investment

CEEM	4.0	4.0
Marketing Communications	3.1	2.4
Business Partnerships	2.4	1.6
Strategy & Insights	-	0.1

North America	13.0	13.2
Great Britain	6.9	11.2
Mainland Europe	12.0	15.2
Australia and New Zealand	0.9	0.8
Emerging Markets and Global Inbound	0.7	1.0

Director of Markets	0.3	-
Finance	0.1	(1.0)
Northern Ireland Stakeholder Engagement	0.2	0.2
Total Core Marketing Investment	43.6	48.6

NOTES

- The above figures do not include any jurisdictional spend funded in calendar year 2024, currently estimated at €7.1m from DfE, and €15.6m from TCAGSM. Reserves at the start of 2024 amounted to €4.5m and the deficit on the finance allocation will be covered from these reserves.
- The figures above are the cash amounts receivable from both jurisdictions in the respective years. We would note that Media Inflation has been running at a greater rate than general CPI over the past few years and that this has adversely impacted the actual real purchasing power of the funding available for marketing.

8. Monitoring the plan

Tourism Ireland continually monitors its performance. To assist with this, a set of Business Plan Indicators/targets (BPIs) have been established. BPIs reflect Tourism Ireland's overall vision for 2024: *Increase the value of overseas tourism to the island of Ireland, sustainably supporting economies, communities and the environment; inspiring visitors and strengthening strategic partnerships. And foster a world class team, demonstrating integrity, living our value and growing expertise.* Each element of the vision has a corresponding BPI.

BPI 1 Increase the value of overseas tourism	Working with Fáilte Ireland, Tourism Northern Ireland, the CSO and NISRA agree a baseline for inbound tourism revenue to the island of Ireland and Northern Ireland by end of 2024. In line with our goal to grow inbound tourism revenue on average by +5.6% per annum out to 2030, we will target this same growth level in 2024.
BPI 2 Supporting economies and communities	Agree a baseline for inbound tourism revenue for Northern Ireland with Tourism Northern Ireland, and the regions of Ireland (outside of Dublin) with Fáilte Ireland. Work with Fáilte Ireland and Tourism Northern Ireland to agree a baseline for out-of-peak inbound tourism revenues (October-May) by end of 2024. In line with our long-term annual average growth goals for inbound tourism to 2030: Inbound tourism revenue for 2024 will target growth for Northern Ireland and the regions of Ireland (outside of Dublin) of +6.5%. Inbound tourism revenue on the island of Ireland in October to May will be targeted to grow in 2024 by +6.5%.
BPI 3 Sustaining the environment	Working with Fáilte Ireland and Tourism Northern Ireland design and implement a communications plan for industry, trade and consumers for the all-island certification and put in place a strategy to prioritise certified industry across Tourism Ireland's work.
BPI 4A Inspiring visitors	Awareness: 1.3 billion quality audio visual 'opportunities to see' across all consumer marketing (excluding static display ads) in 2024
BPI 4B Inspiring visitors	Awareness: Deliver 1.545 billion quality 'opportunities to see' through publicity (in Tier 1 Media), 500m of which will feature Northern Ireland.
BPI 5 Inspiring visitors	Consideration: Achieve an average 5% brand uplift in those who have seen Tourism Ireland campaign materials compared to those who have not. Brand uplift measures the impact of our advertising in driving recall and consideration of the island of Ireland as a destination. Measured via Brand Uplift Studies of all campaigns with a spend over €100k.
BPI 6 Inspiring visitors	Research: 8.7 million people will research the island of Ireland on Ireland.com during 2024, a +12% increase year over year. Measured by Net Usable Web Visits.
BPI 7 Inspiring visitors	Advocacy: Increase the number of followers on Tourism Ireland's social media channels to 7 million by the end of 2024 an increase of +7% year over year.

BPI 8 Strengthening partnerships	B2B events: Support 25,000 meetings between industry and trade throughout 2024, including 7,500 Business Events' meetings and 4,000 Golf and Luxury meetings.
BPI 9 Strengthening partnerships	Co-operative campaigns: All co-operative campaigns to achieve a 10:1 return on Tourism Ireland's investment.
BPI 10 Strengthening partnerships	Industry engagement: During 2024 at least 750 island of Ireland businesses, including 250 from Northern Ireland to benefit from Tourism Ireland engagement.
BPI 11 World class team demonstrating integrity	Budget rigour and efficiency: the 2024 accounts will be unqualified with no priority 1 audit findings and administer expenditure in line with +/- 1% maximum unplanned or forecast variance threshold.
BPI 12 Living our values and growing expertise	Achieve Great Places to Work certification again in 2024, with an increase in average satisfaction by +8 percentage points on 2023.

Note: a change has been made towards all tourism revenue rather than holiday revenue. This is to allow for further alignment between Tourism Ireland and Fáilte Ireland/Tourism Northern Ireland as this is the metric used by sister agencies. The change also reflects Tourism Ireland's widening remit to include Business Events.

Note: the data used to measure the value of tourism will continue to be the official CSO, NISRA and Fáilte Ireland's Survey of Overseas Travellers statistics; the agreement referred to above relates to detailed mechanics of amalgamating the figures across the whole island of Ireland.

Note: there are many factors that affect annual trends in inbound tourism revenue to the island of Ireland many beyond the control of Tourism Ireland. To address this, our targets in this area are long-term – average annual growth to 2030.

Note: NISRA are likely to produce quarterly estimates for revenues, we will pro-rata Northern Ireland quarterly data to create an estimate of October – May.

Monitoring and reporting

Progress against the plan is monitored as follows:

- Each Tourism Ireland staff member has personal objectives linked to this plan.
- Through the management chain, activity is designed and enacted according to the plan and the outcome of our work is reported against the plan objectives.
- Each BPI has an internal owner who reports on the progress of each measure each quarter.
- A quarterly summary report is produced and shared with the Senior Management Team, Tourism Ireland Board, and sponsor departments for discussion.
- A report on progress is prepared and shared in advance of Oversight and Liaison meetings and this forms a standing agenda item at these meetings.
- The outcome of each BPI is reported on within the following year's business plan.

Return on Marketing Investment

During 2024 Tourism Ireland will develop a methodology to report on the return on marketing investment (ROMI). A plan will be developed and agreed to determine the most viable route to calculating the ROMI and during the course of the year work will begin to measure the return. Progress will be reported to departments through a standing agenda item at Oversight and Liaison meetings.

Appendix – A

Business Plan - Proposed 2024 Budget Allocation - In Euros 000's

North South Body	Approved Budget 2023			Proposed Change +/-			Proposed Budget 2024		
<i>€1.00 = 0.87GBP</i>	Resource	Capital	Total	Resource	Capital	Total	Resource	Capital	Total
Programme	43,541	7,040	50,581	5,101	345	5,446	48,642	7,385	56,027
Total Programme Expenditure	43,541	7,040	50,581	5,101	345	5,446	48,642	7,385	56,027
Pay Costs	15,966	0	15,966	1,084	0	1,084	17,050	0	17,050
Non-Pay Administration Costs	10,800	0	10,800	150	603	753	10,950	603	11,553
Total Admin Costs (excl. Pensions)	26,766	0	26,766	1,234	603	1,837	28,000	603	28,603
Total Programme & Administration Expenditure, excl. Pension Costs	70,307	7,040	77,347	6,335	948	7,283	76,642	7,988	84,630
<i>NI share representing 27%</i>	14,859	0	14,859	5,939	948	6,887	20,798	948	21,746
<i>IRL share representing 73%</i>	55,448	7,040	62,488	396	0	396	55,844	7,040	62,884
Pension costs – NI	291	0	291	0	0	0	291	0	291
Pension costs – IRL	800	0	800	300	0	300	1,100	0	1,100
Overall Total Expenditure for approval	71,398	7,040	78,438	6,635	948	7,583	78,033	7,988	86,021
<i>Total NI share, including pension costs</i>	15,150	0	15,150	5,939	948	6,887	21,089	948	22,037
<i>Total IRL share, including pension costs</i>	56,248	7,040	63,288	696	0	696	56,944	7,040	63,984
Existing/Projected Staff Numbers (FTE)	168			0			168		

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

	NI	IRL
Pension/benefit costs for N/S Body service*	291	1,100
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
Total costs of pensions/benefits included in Business Plan	291	1,100

*Please complete as applicable

Appendix B

2023 Business Plan – update on key performance indicators

Due to the timing of this draft, progress outlined below is estimated based on performance up to the end of Q4 2023. Full data will be available February 2024.

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)	<i>Due to a change in the data collection methodology outside of Tourism Ireland's control, it is not possible to assess progress against this target.</i>	
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)	<i>Information is not currently available for NI revenue as NISRA have yet to confirm details of 2023 data and whether this will be comparable with 2019 data.</i>	
BPI 3 - Deliver 9.2 million Net Usable Web Visits to Ireland.com in 2023	<i>By the end of 2023 Ireland.com had received 8 million NUWV's, which is 87% of the total target. This was a function of reduced organic social and email database quality due to database ageing and an increased focus on quality interactions.</i>	
BPI 4 - Drive word of mouth – Social EAV to be €20.6m/£17.7m in 2023	<i>Target achieved - Tourism Ireland delivered €20.7m/£17.8m Social EAV, which was 101% of the annual target.</i>	
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	<i>Target achieved – 4.7 million commercial third-party digital referrals were made to help close the sale, which was 108% of the annual target.</i>	
BPI 6 - Deliver 3.8 billion 'Opportunities to see' across all consumer marketing (excluding publicity) in 2023	<i>Target achieved – Over 4.5 billion 'opportunities to see' were delivered across all consumer marketing (excluding publicity) which was 119% of the annual target.</i>	

Social

BPI 7 – Ensure at least 60% of Tourism Ireland generated publicity coverage features a regional message	<i>Target achieved - 67% of Tourism Ireland's generated publicity coverage featured regional messages.</i>	
BPI 7A – Ensure at least 25% of Tourism Ireland generated publicity coverage features a non-peak message	<i>Target achieved - 38% of Tourism Ireland's generated publicity coverage featured non-peak messages.</i>	

Environmental

BPI 8 - With Fáilte Ireland and Tourism Northern Ireland, agree a sustainable certification approach for island of Ireland industry by end of 2023	<i>Completed in full. All island certification assurance scheme will be rolled out to Industry, Trade and Consumers in 2024.</i>	
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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:			<i>Due to a change in the data collection methodology outside of Tourism Ireland's control, it is not possible to assess progress against this target.</i>
	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			

Customer

BPI 10 - New segmentation model, communications and implementation plan agreed by Board and implemented by end of the year	<i>The new segmentation model is complete and is now being communicated to relevant stakeholders.</i>
BPI 11 – Ensure 1.4 billion consumers reached through publicity coverage generated	<i>Target achieved – 2 billion consumers were reached through publicity generated by Tourism Ireland, which was 145% above target.</i>
BPI 12 – Ensure at least 85% of publicity coverage featuring key messages in 2023	<i>Target achieved – All markets exceeded their targets. At the end of 2023, 99% of all publicity generated covered key messages.</i>
BPI 12A – Ensure at least 33% of publicity coverage featuring Northern Ireland messages	<i>Target achieved – 35% of publicity generated by Tourism Ireland featured Northern Ireland messages.</i>

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	<i>Target achieved - by the end of 2023, over 1,400 industry partners on the island of Ireland took part in overseas marketing activities, which was 149% above the target.</i>
BPI 13A – At least 333 discrete Northern Ireland industry engaged in in-market activity by market by end of 2023	<i>Target achieved - 429 industry partners in Northern Ireland participated in Tourism Ireland promotions in 2023, which was 139% above the target.</i>
BPI 14 – At least 2,000 discrete opportunities to be taken up by industry partners by the end of 2023	<i>Target achieved – 2,229 discrete opportunities were taken up by industry partners.</i>
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	<i>On-going – Surveys were issued to industry participants for 20 events and six month follow up surveys had been issued for 11 events by year-end.</i>
BPI 16 – Global KAM model established, and all trade partners appropriately tiered by end Q3 2023	<i>Achieved – A strategic approach to KAM has been developed. Key accounts have been clustered (tiered) in all markets.</i>

BPI 17 – Co-operative marketing achieves at least a 10:1 return on campaign investment	<i>€3.7M of funding was invested in co-op in total with an estimated return of €260M equating to a global ROI of 69:1.</i>	
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Organisational

BPI 18 – Develop a new marketing effectiveness metric for 2024 activity	<i>Paused – new metrics proposed as part of 2024 Business Plan.</i>	
BPI 19 – Financial stewardship: no priority 1 audit findings and administer expenditure in line with +/- 1% variance threshold	<i>Target Achieved - no priority 1 audit findings and administer expenditure in line with +/- 1% variance threshold</i>	
BPI 20 – Achieve Great Places to Work accreditation in 2023	<i>Target Achieved - Tourism Ireland achieved this accreditation in 2023.</i>	

[Green – completed / Red – incomplete / Grey – changed/n/a]

Appendix C

2023-2025 Corporate Plan – update on key performance indicators

In 2023 Tourism Ireland made good progress towards the ambitions set out in our Corporate Plan. The ambitions remain valid and the 2024 work programme has been designed to progress the plan into its second year.

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)	<i>Due to a change in the data collection methodology outside of Tourism Ireland's control, it is not possible to assess progress against this target. Note: an updated target is outlined earlier in this plan.</i>
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)	<i>Due to a change in the data collection methodology outside of Tourism Ireland's control, it is not possible to assess progress against this target. Note: an updated target is outlined earlier in this plan.</i>

Social

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	<i>Due to a change in the data collection methodology outside of Tourism Ireland's control, it is not possible to assess progress against this target. Note: an updated target is outlined earlier in this plan.</i>
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	<i>Due to a change in the data collection methodology outside of Tourism Ireland's control, it is not possible to assess progress against this target. Note: an updated target is outlined earlier in this plan.</i>

Environmental

CPI 5 - By 2025, prioritise the promotion of IOI sustainably certified industry (subject to scheme agreement)	<i>Fáilte Ireland and Tourism Northern Ireland are working with Tourism Ireland to create an all-island certification. This is on-track to be launched in 2024.</i>
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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:			<i>Due to a change in the data collection methodology outside of Tourism Ireland's control, it is not possible to assess progress against this target.</i>
	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			<i>A Mainland Europe Appraisal is included within the 2024 Business Plan.</i>
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			<i>Operational assessment of Emerging Markets was completed in 2023 as planned. Australia/NZ assessment is awaiting the publication of updated tourism policies in Ireland and Northern Ireland.</i>

Customer

CPI 9 - New overseas consumer segmentation model to be embedded within Tourism Ireland and industry and influencing activity by end 2023	<i>A new consumer segmentation model was developed in 2023 and will be embedded within Tourism Ireland and industry during 2024.</i>
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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	<i>Work is underway to set the benchmark for this activity. Due to timing of events and the specific nature of the methodology chosen, this will now be available early 2024.</i>
CPI 11 - All co-op activities to demonstrate at least a 10:1 return on investment	<i>The return on investment in co-op activities during 2023 was 69:1; 67 out of the 87 investments to date achieved a 10:1 return.</i>

Organisational

CPI 12 - Diversity & inclusion plan completed by end of 2023	<i>Work has been ongoing on the diversity & inclusion plan however, this will now be completed early 2024.</i>	Amber
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	<i>A new sustainability strategy aimed at embedding ESG in the way we work was devised and has commenced with a plan devised for full implementation from 2024.</i>	Green
CPI 14 - Develop a new marketing effectiveness metric for 2024 activity	<i>This work is ongoing.</i>	Amber
CPI 15 - Benchmark employee engagement survey results against best in industry class and achieve accreditation by end of 2023	<i>Accreditation was achieved in 2023.</i>	Green
CPI 16 - Track the reputation of Tourism Ireland on the island of Ireland by 2025	<i>Scheduled for 2025.</i>	Green
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	<i>No priority 1 audit findings have been identified to date and expenditure is forecast to be within +/-1% of the variance threshold.</i>	Green

[Green – on-track or completed / Amber – in-progress but delayed / Red – unlikely to be completed / Grey – changed/n/a]