

# **Tourism Ireland Business plan 2025**

NSMC APPROVED (v5.1)

## Executive Summary

Overseas Tourism to Ireland brings an estimated €7.3b / £6.3b onto the island of Ireland (2024 projection). Tourism is one of the island's largest indigenous employers and collaborative shared industries across the island of Ireland. With **~70% of tourism jobs outside of Dublin or Belfast**, it supports significant rural entrepreneurialism and employment. Of the 300K jobs supported island-wide by the tourism industry, **~200k jobs are dependent on overseas tourism** specifically. This is because **overseas visitors spend more and stay longer** (2.7X the spend and 3X duration per trip vs domestic), contributing **66% of overall tourism revenue**.

### TOURISM IRELAND VISION

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

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

Investment in Tourism Ireland's consumer marketing programs shows an estimated **25:1 return on marketing investment**, such that for every €1 spent on marketing, €25 of visitor spend is generated on the island of Ireland.

Tourism Ireland targets **+5.6% revenue growth on average per year to 2030**, growing overseas revenue to around **€9.3b / £8.1b by 2030**, supporting communities and economies whilst responsibly sustaining the environment.

### Challenges and Risks for 2025:

- 1) **Cost of living** concerns in overseas markets, with 41% of consumers planning fewer short trips due to personal finances.
- 2) **Competitiveness** challenges with businesses on the ground facing cost inflation, feeding into higher pricing.
- 3) **Capacity and Dublin airport cap**; at the time of writing the Dublin airport passenger cap is paused for summer 2025, however it remains in place for winter and continues to be a threat to growth for inbound tourism, accommodation capacity issues also remain.
- 4) **The UK's Electronic Authorisation to Travel (ETA) system** will be implemented during 2025 posing a potential drain on growth as a quarter of French and German and a fifth of US travellers indicate they would avoid travelling to an area where they need an ETA.

### Opportunities and Mitigations for 2025:

- 1) **Achieve high value trips per visitor** to make every visit count, by focusing on key audience segments who are likely to do more, enjoy more and spend more when they visit.
- 2) **Promote access across the island** through cooperative marketing to stimulate demand for access routes with growth potential (subject to core funding).
- 3) **Encourage spread of tourism across the whole of the island of Ireland** through identifying and prioritising 'overseas scale-ready' hub destinations, with a content calendar of compelling social and publicity promotion.
- 4) **Seasonal 'tent pole' themes and events** will be used to deliver the message that the island of Ireland offers a world-class product all year round. This will include a particular emphasis on Halloween and Saint Patricks Day as well as event based opportunities such as Trad Fest.
- 5) **Promoting slow tourism**: In 2025, Tourism Ireland will build on promotional activities to support environmentally friendly itineraries on the island of Ireland. During 'slow tourism month' an overseas marketing initiative will focus advertising, social media and publicity activities on car free itineraries, that support greater dwell time in communities and in nature.
- 6) Tourism Ireland will continue focusing on **higher revenue per carbon footprint markets and segments**, to support higher economic and social contributions from tourism relative to carbon generated.

- 7) **A full programme of industry and trade platforms** will be undertaken around the world to support tourism jobs in local communities by bringing island of Ireland industry together with overseas trade who can bring visitors at scale.
- 8) **Innovate to inspire** visitors, utilising responsible AI in media placements, while evolving our 'Fill Your Heart With Ireland' campaign to speak to current audience needs, behaviours and expectations.

We will support our plans by fostering a world class team through focus on an inclusive, supportive learning culture utilising 'Great Places to Work' feedback. We will demonstrate high financial and governance integrity. We will support the team of the future through progressing an organisational capacity review.

Tourism Ireland doesn't operate alone, we work closely with a wide range of partners both on the island of Ireland and around the world. Our plans are closely aligned with Fáilte Ireland and Tourism Northern Ireland who have close inter-dependencies particularly around the development of regional, seasonal and sustainable product and experiences.

## 2025 Plan Summary:

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

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

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

Objective	Accountability
Increase the <b>value of overseas tourism</b>	<b>Increase overseas tourism revenue across the island of Ireland by +5.6%<sup>1</sup> growth per year on average over the period 2024 to 2030.</b>
Supporting <b>economies and communities</b>	<b>+6.5% revenue growth in Northern Ireland, Ireland's regions and in non-peak seasons (October to May) per year on average over the period 2024 to 2030.</b>
Sustaining <b>environment</b>	Continued prioritisation of markets and segments based on <b>revenue per carbon footprint</b> calculations, with refresh to analysis to occur in 2025. <b>Slow tourism month</b> focused on car-free travel itineraries to encourage sustainable exploration of the regions of the island of Ireland. Establish externally validated <b>measurement of Tourism Ireland's environmental footprint.</b>
Inspiring <b>visitors</b>	<b>Awareness (advertising): 1b high quality audio visual 'Opportunities To See' across all consumer marketing in 2025.</b> <b>Awareness (publicity): 1.6b quality 'Opportunities To See' through publicity in Tier 1 media, 500m to feature Northern Ireland.</b> <b>Consideration: All new brand creative (with media investment &gt;€1Mn and or Production budget &gt;€400k) to be in the top 30th percentile for Persuasion score – independently measured.</b> <b>Research: 10m research visits on Ireland.com during 2025, building itineraries and ideas for where to visit. To include new content and a toolkit on peace tourism.</b> <b>Advocacy: 7.5m followers on social channels by the end of 2025, allowing for daily content and communication at scale. 70% of content created for social contains regional or seasonal message across scheduled feed posts.</b>
Strengthening <b>partnerships</b>	Support <b>30k meetings between industry and trade overseas</b> , to include <b>7.5k business events meetings and 6k golf and luxury meetings.</b> <b>Access campaigns</b> promoted through cooperative marketing to achieve <b>10:1 ROI on Tourism Ireland's investment.</b> Industry engagement to offer promotional opportunities to <b>750 island of Ireland businesses</b> , including <b>250 businesses selling Northern Ireland.</b>
World class team demonstrating <b>integrity</b>	Budget rigour and efficiency: <b>no priority 1 financial control audit findings</b> , expenditure +/- 1% variance.
Living our <b>values and growing expertise</b>	Uplift our 2024 <b>employee satisfaction score +5%</b> , building on our <b>Great Place to Work accreditation.</b> Initiate <b>organisational capacity review</b> to set up for success in our staffing, structures and upskilling.

<sup>1</sup> All revenue growth targets are nominal.

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### Note:

This document has been written in accordance with the 2025 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 2024 Business plan including explanations for discrepancy and/or changes – this is outlined in section 1 ‘2024 in Review’ and in detail in the appendices.*
- *Updated and revised priorities and SMART objectives supported by any relevant targets for 2025. 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 2025’, specific targets are linked to activity throughout section 3 and 6 and repeated in section 8.*
- *Activities planned for 2025 to deliver against our objectives with clear and measurable performance targets – this is outlined in section 3 ‘Activity plan’ and section 6 ‘Supporting organisational excellence’.*
- *Budgets, resources and grants required for 2025 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 two additional sections ‘Tourism policy and strategy’ 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. 2024 In review

At time of writing, Tourism Ireland is on track to support **increasing the value of overseas tourism to the island of Ireland by >+5.6% y/y** in 2024. At the time of writing Tourism Economics estimate 2024 total revenues of €7.3b/£6.3b a +15% increase. Impact is achieved through an extensive and rigorously tracked marketing program.

- Throughout the year, we achieved **1 billion Opportunities To See** through advertising, tied to **5% brand uplift**, that is lifting recall and consideration of the island of Ireland as a destination to visit this year (test vs control group). Our 'Fill Your Heart With Ireland' campaign included our primary Derry Girls / Sharon Horgan creative, alongside 'passion point' or interest focused creative. The second half of the year saw the relaunch of **'Home of Halloween'** to inspire interest in the Autumn season, with a potential benefit of achieving **~€60m economic impact** within 5 years, through inspiring 70,000 visitors. In our media buying, we rolled out data driven techniques and AI technology with platforms to understand intent signals at scale and show advertising to audiences with the greatest propensity to then research regions and locations further on Ireland.com.
- We achieved **1.5 billion reach** through publicity across 14+ markets, focused on tier 1 publications and broadcasters. Using our programming fund, we continued to stimulate large scale, mainstream broadcast activities to promote the island. Broadcast shows co-produced by Tourism Ireland to stimulate interest at scale included a five episode travel show with Dermot O'Leary on ITV to reach 15m in Great Britain this autumn, a travel series with celebrity chef Anna Haugh for BBC2, or Golf's Greatest Holes on Sky Sports, with potential to syndicate to up to 30 global channels, showcasing golf locations on the island of Ireland ahead of the Open at Royal County Down in 2025. For the US, 'Ireland with Michael' featuring singer Michael Londra filmed series 5, having already reached some 50m+ across PBS networks. Emmy award winning US travel series 'Bare Feet with Michela Mallozzi' filmed across North Wild Atlantic Way and Northern Ireland, to showcase transatlantic connectivity to Shannon, Leitrim's music scene, Sligo oysters, Malin Head, Derry~Londonderry, Dungiven bodhran making, Giant's Causeway, McConnell's Belfast and the Cathedral Quarter. In addition, shows co-produced in prior years continued to scale, demonstrating efficiency and effectiveness, for example, our food travel series with Donal Skehan scaled to PBS in the US this year, building on 20m reach already achieved across Germany, Sweden and Canada.
- **Screen tourism** is a trend we continued to leverage effectively, as popular shows and films with this island as the backdrop inspired new audiences to learn more. Tourism Ireland's behind the scenes footage from Bodkin, The Tourist, and Vikings of Valhalla reached >6m opportunities to see, with high engagement, making the connection for fans between loved screen content and locations featured.
- We influenced research with **8.5m deep research visits** to our website, cross-selling from today's bucket list destinations to hidden gems. Top location pages for traffic outside of Dublin and Belfast included Wild Atlantic Way, Ireland's Hidden Heartlands, Galway, Cork, as well as Northern Ireland overall, Derry~Londonderry and the Causeway Coast. UI redesign began, split testing the most effective ways to surface 'hidden gems' that can encourage visitors to discover more in the regions.
- We approached **7m social followers**, who we can post content to daily, in turn influencing their own social networks of 100X size when they interact with our content. This year's goals were worked towards through a mixture of creative iteration and optimisation as well as targeted paid activities to attract follower growth.

- Markets around the world maximised their ‘twinning’ relationships with regions across the island of Ireland ensuring our teams are close to industry on the ground. Great Britain concluded their third year ‘twinned’ with Derry~Londonderry and Donegal and the United States team moved to a new twin of Mayo, Sligo and Fermanagh.
- Surfacing **compelling stories from industry**, we marked 700 years since the first written reference to whiskey distilling on the island of Ireland in the Red Book of Ossory of 1324 (which is soon to go on show in St Canice’s, Kilkenny). In collaboration with the Irish Whiskey Association, we promoted an island wide distillery trail featuring 28 visitor attractions, based on the insight that 800,000 people choose distillery experiences each year, the majority from overseas, with online research into Irish Whiskey Tours +20% from key markets like Germany, US and Great Britain. Distilleries are often in scenic regional locations, and with one quarter of visitors not drinking / tasting whiskey on their tour, thus we know the appeal is scenery, heritage and craft, beyond the whiskey itself. Tourism Ireland launched a targeted video campaign, with social postings.
- **Saint Brigid’s Day** was the ideal platform to promote springtime and **Saint Patrick’s Day** provided the opportunity to bring the island of Ireland into the homes of millions of potential visitors. Tourism Ireland supported livestreaming of parades on the ground in Ireland to US news-desks and brought a taste of St Patrick’s day to European markets, through Irish film, music and dance in iconic locations. St Patrick’s Day created up to 4X the level of internet search interest in Ireland vs Spring averages. **Belfast 2024**, the **Aer Lingus US College Football Classic** and the **Six Nations** provided further high-profile opportunities.
- With our partners we facilitated **25,000 commercial meetings**, with **750 distinct island of Ireland businesses**, **250 of whom promoting Northern Ireland**, meeting with overseas travel trade to facilitate visitation at scale. **6,000 business events** focused meetings were facilitated over the year under the ‘Meet in Ireland’ banner, to win strategic business events travel, which tends towards being high value, off season and mid-week.
- High profile **events** in the partnerships space included Flavours of Ireland in London with 60 industry operators from the island of Ireland meeting 100 global inbound tour operators, World Travel Market in London featuring 75 industry operators from the island of Ireland at the flagship B2B travel trade show, and IMEX America, featuring 35 island of Ireland businesses, with a business events focus.
- 2024 was a big year for golf as we prepared for **The Open 2025 and the Ryder Cup in 2027**. Partnerships are under way with key broadcasters and publications, collaborating with Sky Sports, Golf Digest and the Golf Channel to promote the destination.
- The new business to business luxury proposition **“Ireland where luxury comes naturally”** helped to keep the island of Ireland front of mind in the luxury trade overseas.
- The planned **sustainability assurance program** was delayed beyond roll out this year, albeit that Tourism Ireland’s ‘mark’ design and owned pieces of the project were all on track. In light of the EU Green Claims directive, development agencies Fáilte Ireland and Tourism Northern Ireland are responsibly reviewing the viability of third party certification versus certification that would need to be defined and led with more central robustness (requiring a longer timeline), in order to ensure rigour of on the ground checks and alignment with standards. Tourism Ireland respected the need for all three agencies to lead with full credibility in this space.

- Meanwhile, the model of promoting **island wide 'slow tourism'**, rail and bike itineraries was scoped both through successful publicity overseas focusing on responsible tourism and eco-tourism experiences in nature. Tourism Ireland achieved publicity for rail journeys around the island, the new Marine Park in Kerry, as well as inland boating (with boating fleets moving to sustainable vegetable oil based fuels).
- We had a strong **people plan** rolling out within Tourism Ireland, to continually build on our own skills, values and collaboration, to be agile in an ever changing landscape, targeting **+8%** Great Places to Work survey uplift. The People Plan was constructed in collaboration with five working groups, staffed with volunteers across levels and locations in the organisation to suggest ways to build on our culture, effectiveness and ways of working. We ran Career Week talks this year, as well as refreshing performance management to focus on objectives and behaviours, the what and the how. Mid-year and end of year performance reviews are supplied for all colleagues. A staff conference allowed global teams to align together and with industry on strategies for the future.
- **Return on Marketing Investment** was assessed, demonstrating estimated return of 25:1, i.e. €25 of visitor spend generated for every €1 spent on marketing overseas.
- Supporting future impact, regular **sentiment tracking** of overseas consumers kicked off this summer, aiding understanding of consumer preferences and blockers in terms of travel to the island of Ireland, and allowing us to continue to hone our marketing over time to speak best to motivators for our audience.
- A **Mainland Europe Appraisal** from 2024 to 2025 will go deeper on analysis of step-change opportunities in European markets, where our share is typically lower than in GB or US.
- We retendered for our lead **creative agency**, assessing local and overseas agencies to hire optimally for refreshed brand and creative support coming into 2025, with effectiveness and impact top of mind.
- We retendered for our **internal audit partner**, to ensure the strongest possible financial integrity.

## Measuring success

Tourism Ireland set out a range of measurement targets in both the Corporate and annual Business Plans. During 2024, Tourism Ireland has made significant progress against the 2023-2025 Corporate Plan Indicators (revised in 2024 Business Plan) and at the time of writing looks set to achieve almost all of the 2024 Business Plan indicators. Appendix B and C outline progress against each target.



## 2. Priorities for 2025

### Context

Inbound tourism to the island of Ireland is strong. 75% of potential visitors in top source markets are interested in spending time on the island of Ireland. Both Ireland and Northern Ireland are known for beautiful landscapes and scenery, and over half of previous visitors go on to recommend a trip to others.

At the time of writing only partial data is available on the volume and value of tourism for 2024 indications however are positive. Inbound tourism remains a vital part of the economy right across the island.

Air and ferry access is strong with a 5% growth in seats available to the island of Ireland in 2024 compared with 2023.

While the overall position is positive, there are risks that may impact delivery of our vision.

Geo-political and global economic risks are real and global tourism as well as tourism to the island of Ireland has the potential to be impacted during 2025.

The potential for the passenger cap at Dublin airport to restrict growth in 2025 and beyond remains an issue (currently paused for summer 2025). Dublin airport is a vital access point accounting for 70% of all air seats to the island.

Accommodation capacity constraints have eased somewhat, with many rooms being returned from government contracts and new hotel stock available particularly in Dublin. There remains however, a sizable number of rooms unavailable to tourism in certain parts of the island which is likely to impact the ability to maximise regional spread of tourism in 2025.

Holiday costs remain high across the world. Research indicates that value for money perceptions of island of Ireland holidays are in line with comparator destinations. Despite this, cost of living issues may continue to impact on the industry in 2025, potentially shortening length of stay or limiting some discretionary demand.

Consumers increasingly consider the environment in their day-to-day choices. Over half of potential holidaymakers claim they would pay more for environmentally conscious accommodation and experiences.

Tourism Ireland's plans have been built with these factors in mind, additional activity on regional, seasonal, and environmental elements of our promotions are planned in line with the Corporate Plan and vision. This plan will remain flexible to adapt to risks as they evolve.

In 2023, the latest available full year baseline, overseas tourists:

Spent:

**€6.4b/  
£5.5b**

Average spend 2.7x  
domestic visitor

Average stay  
3x

Supported:

**c.300k  
jobs**

~70% outside  
Dublin/Belfast

~2/3 reliant on  
overseas tourism

## Approach to 2025

2025 is the third and final year of the 2023-2025 Corporate Plan period. The Corporate Plan is Tourism Ireland's most sustainable yet with the three core pillars of tourism sustainability at its heart – economic, social and environmental.

In the 2024 Business Plan, Tourism Ireland set out a vision for how the plan will be achieved; this vision will continue into 2025:

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

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

Our 2025 plan will complete the Corporate Plan by focusing on this vision.

Sustainability remains at the core of Tourism Ireland's plans with Value Adding Tourism Traits continuing to guide thinking. Value Adding Tourism Traits apply across all work areas with the aim of creating demand which delivers:

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

No revisions to Corporate Plan targets (revised in 2024) are envisaged. A summary of these targets is included in Appendix C.

A new Tourism Policy Framework has been published in Ireland and Northern Ireland is shortly to publish a Tourism Action Plan. Tourism Ireland expects the 2025 business plan to be in line with the new policy framework and action plan.

Clear Business Plan Indicators (BPIs) are associated with each element of the vision to demonstrate impact. These BPIs are linked directly to activity and outlined in Section 3 'Activity Plan' and Section 7 'Supporting organisational excellence'. They are summarised in Section 8 'Monitoring the plan' but for brevity are not repeated here.

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 workplan mirrors our vision.

#### Increasing the value of overseas tourism to the island of Ireland

##### BPI 1

Increase overseas tourism revenue across the island of Ireland by +5.6% growth per year on average over the period 2024 to 2030<sup>2</sup>.

##### BPI 2

Increase overseas tourism revenue across Northern Ireland by +6.5% growth per year on average over the period 2024 to 2030.

As set out in the Corporate Plan, economic sustainability is a core element of Tourism Ireland's goals. All our work ladders up to this element of the vision.

During 2025 we will drive impact through '**fewer, bigger, better**' thinking, with data driven decision making to inspire visitors with highly effective, targeted creative and media strategies.

Particular demand building elements for 2025 include:

- The '**Fill Your Heart with Ireland**' brand creative which will ensure high levels of awareness to grow interest and ultimately booking.
- **Continued embedding of Tourism Ireland's overseas consumer segmentation** to efficiently target those most persuadable to visit the island of Ireland sustainably.
- A particular focus on **demand generation** to encourage greater access opportunities (subject to appropriate core funding).
- Working with Fáilte Ireland, Tourism Northern Ireland and industry we will **adapt demand creation activity in line with capacity** and opportunities in order to maximise and spread opportunities.
- Tourism Ireland's **Mainland Europe Appraisal** will conclude early 2025, we will act on its recommendations to accelerate growth and share gains, beyond English speaking markets.

During 2025 the **Tourism Ireland Corporate Plan 2026-2029** will set up the next chapter of responsible overseas tourism marketing with the continued aspiration of increasing the value of overseas tourism to the island of Ireland.

Tourism Ireland's consumer segmentation identifies the next-best targets in market.

Enrichment Explorers over index on Value Adding Tourism Traits and seek holidays where the island of Ireland excels.

Creative is designed with Enrichment Explorer's needs front and centre and market and media plans hone in on Enrichment Explorers to maximise impact around the world.



<sup>2</sup> All revenue targets within the Business Plan are nominal.

## Supporting economies and communities

### BPI 3

Supporting economies and communities through +6.5% revenue growth in Northern Ireland (BPI 3A), in regions (BPI 3B) and in non-peak seasons (October to May) (BPI 3C) per year on average over the period 2024 to 2030.

In line with the Corporate Plan Value Adding Tourism Traits approach, regional and seasonal spread are important elements supporting employment and economies right across the island.

Publicity and social content have the ability to tell the story of the world class regional product, including regional Northern Ireland, throughout the whole year. Our teams will prioritise inspirational messaging throughout the year.

### Regional spread

#### *Destination readiness*

We will collaborate with Fáilte Ireland and Tourism Northern Ireland to promote destinations across the island that are overseas tourism ready (i.e. have accommodation stock, attractions, nightlife, scenery to scale).

Particularly in relation to non-peak promotion we will draw on Fáilte Ireland's Destination and Experience Development Plan's and we will work with Tourism Northern Ireland to agree tourism ready locations with strong year-round international appeal.

#### *Icons of the future*

Working with Fáilte Ireland, Tourism Northern Ireland and industry we will create cut through by establishing the next 20-30 'scale ready', 'must visit' regional highlights in overseas promotion. This medium-term plan will help build regional spread into the future.

#### *Twinning to drive storytelling*

Market twinning initiatives have helped build strong bonds between the regions of Ireland and Northern Ireland and Tourism Ireland's overseas offices. In 2025 twinning's will be leveraged to ensure authentic product knowledge is available across our messaging.

#### *Journey to Peace Tourism*

We will develop activity to appropriately represent tourism opportunities around the journey to peace, using targeted approaches to give people reasons to stay longer and do more.

As part of the initiative, we will prepare a Peace Tourism toolkit for markets to promote the story and experience on the ground across the island of Ireland.

### Season extension

#### *Compelling content calendar and seasonal 'tent poles'*

Activity across the world will follow a theme-based calendar enabling teams and industry to plan ahead and coordinate content across all channels particularly publicity and social. The calendar will be used to give visitors reasons to travel achieving both seasonal and regional spread. The calendar will build 'must visit' moments including Tradfest, St Patrick's Day, Halloween and more.

We will work with Fáilte Ireland, Tourism Northern Ireland and industry to ensure internationally appealing content is available for festivals and key seasonal themes. We will also look at the timing of media visits to ensure the resulting communications help to build visitation out of peak.

## Sustaining the environment

### BPI 4

Run a slow-tourism month focused on car-free travel itineraries to encourage sustainable exploration across the island of Ireland.

### BPI 5

Establish externally validated measurement of Tourism Ireland's environmental footprint.

The Corporate Plan focus on Value Adding Tourism Traits will continue throughout our work in 2025, encouraging visits that support the economy, communities and are environmentally conscious.

In support of this we will undertake a **slow tourism month**. During the month we will prioritise slow tourism messages across our channels including itineraries that promote car free, rail, hike, boating and cycle routes (sustainable travel).

**Slow tourism month** will build on the 2024 'Sustaining Business' activity with an overseas marketing initiative. Communications will cover the whole island of Ireland and outline the opportunities of travelling car free across the island of Ireland encouraging longer trips. In near to home markets rail and ferry access routes will also feature within the campaign.



In addition, **publicity, media visits, trade communications and events will cover slow tourism opportunities.**

This overseas island of Ireland marketing campaign will pull together the existing slow tourism options with product input from Fáilte Ireland and Tourism Northern Ireland. We will continue to work with Fáilte Ireland, Tourism Northern Ireland and others to **encourage the development of ever more environmentally aware product across the island of Ireland and wider public transport options for tourists.**

Tourism Ireland's overseas marketing target segment, Enrichment Explorers, were chosen due to their Value Adding Tourism Traits and messaging around slow tourism will appeal to their holiday needs.

### Good citizen activity

Tourism Ireland itself will increasingly lead by example with a range of activity to moderate our corporate footprint and continue the move to sustainable best practices in our event, office spaces and ways of working.

Evidencing and measuring impact is an important step to minimising it. **During 2025 we will seek to externally validate our activity and identify a suitable environmental certification.**

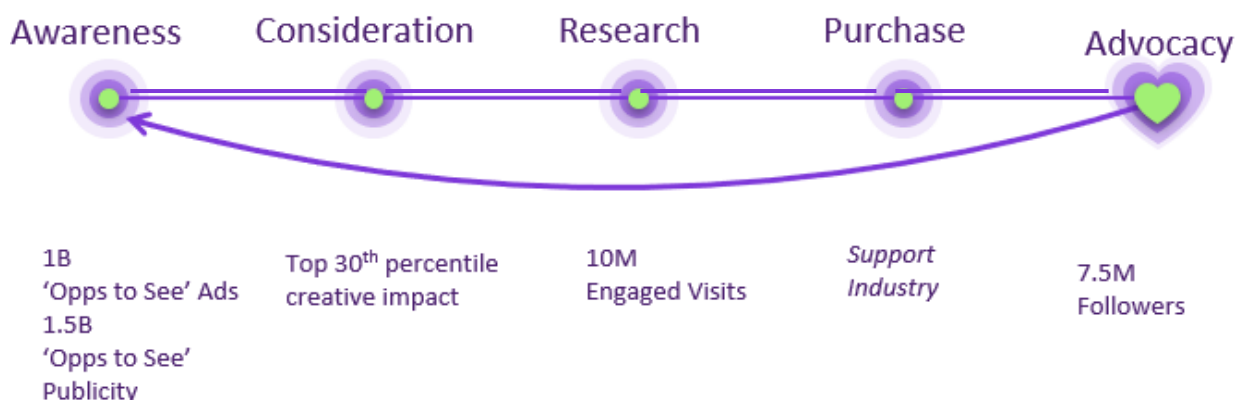
Tourism Irelands '**Working Towards Sustainability**' framework will continue with teams across the organisation playing their part to embed sustainability in to all our activity. This will include teamwide upskilling on sustainable best practice, in our ways of working and in our storytelling to build sustainability themes at every stage of the consumer decision making process.

We will continue to consider '**revenue per carbon footprint**' in our decision making, to prioritise value adding tourism traits.

In Emerging Markets – generally further away from the island of Ireland - we will leverage partnerships to access higher value segments.

## Inspiring visitors

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



### Awareness

#### BPI 6

**1b high quality audio visual 'Opportunities To See'** across all consumer marketing (excluding static display ads) in 2025<sup>3</sup>.

#### BPI 7

**1.6b quality 'Opportunities To See' through publicity** in Tier 1 media (BPI7A), 500m of which will feature Northern Ireland (BPI 7B).

Ensuring our compelling messaging cuts through and is seen by as many of our target audience as possible is a vital element of our activity.

During 2025 Tourism Ireland's media agency contract will be retendered, Tourism Ireland will work with the successful agency to establish the most effective media plans to achieve our vision. The tendering process is important and will be a significant element of work in its own right during the year.

We will increasingly utilise responsible Artificial Intelligence (AI) best practice for media placement, to use millions of signals in real time to place the right message, with the right person, at the right time. AI will enable us to achieve best practice reach and frequency with our target audience creating cut through.

Media effectiveness is not all about Opportunities To See, we will continue to ensure the media is delivering its objectives through media audits and post campaign analysis. Brand Uplifts will continue to ensure larger campaigns are being recalled and creating consideration.

In publicity, teams will focus on stories to showcase the magic of the regions across the island, using itinerary ideas and/or top things to see and do in a region to win coverage and ultimately visitors. Partnerships to co-produce high quality broadcast shows with benefit to tourism and with clear distribution opportunities overseas will be scaled. Upcoming opportunities range from travel content to Halloween documentaries, cycling shows showcasing scenery and food focused broadcasts supporting the food scene on the island.

<sup>3</sup> Note this is a changed measure from 2024 which limits OTS to those with a minimum dwell time per video – i.e. more meaningful engagement with the marketing. During 2025 we will measure reach and frequency to inform detailed planning in the 2026-29 Corporate Plan.



## Consideration

### BPI 8

All new brand creative (with media investment >€1m and or Production budget >€400k) to be in the **top 30th percentile for Persuasion score** – independently measured.

Tourism Ireland's creative inspires visitors to invest their holiday time and money in a trip to the island of Ireland. We have wonderful material to work with covering the character and characters across the island. Our creative content needs to be world class to cut through and change behaviours as well as demonstrate that there is a welcome for all on the island of Ireland.

During 2025 Tourism Ireland will on-board a new creative agency. This will focus on targeting today's consumers in an evolving landscape, utilising evolving digital communication preferences maximising effectiveness across markets and media.

To ensure our creative is world class before we invest behind it, **all new brand creatives will be independently pre-tested** for their ability to drive consideration and optimised to generate top quadrant impact.

## Research

### BPI 9

**10m people will research the island of Ireland on Ireland.com** during 2025. Measured by Research Visits.

Ireland.com offers a great opportunity for potential visitors to find out more about a visit to the island of Ireland.

During 2025 **Ireland.com will undergo a step change to meet consumer needs and expectations**. This will accelerate usage as the shop window for what to see and do, highlighting hidden gems and icons of the future, and providing content for AI driven search patterns. The work will build on the development initiatives undertaken in 2024.

The redesigned site will point to **hidden gems informed by our vision** and will draw upon the publicity and social-led regional and seasonal work programmes.

## Advocacy

### BPI 10

**7.5m followers on social channels** by the end of 2025.

### BPI 11

**70% of content created for social contains regional or seasonal message** across scheduled feed posts.

Social channels are a vital channel to communicate the island of Ireland's varied and compelling tourism product and experiences. Maximising followers amplifies the message as every follower acts as an ambassador for the brand linking our content to their network.

Early in 2025, Tourism Ireland will undertake a social channel and consolidation audit and establish a social video strategy. This will enhance our approach to world-wide social engagement establishing 'light house' accounts per language and channel, reducing fragmentation and growing impact whilst increasing efficiency. Social media offers the opportunity to bring inspiring creative to audiences on a daily basis, helping create a platform for regional content.

## Strengthening strategic partnerships

### BPI 12

Support **30k meetings between industry and trade overseas**, to include **7.5k business events meetings**, and **6k golf and luxury meetings**.

### BPI 13

Access campaigns promoted through **cooperative marketing to achieve 10:1 ROI** on Tourism Ireland's investment.

### BPI 14

Industry engagement to offer **promotional opportunities to 750 island of Ireland businesses**, including **250 businesses selling Northern Ireland**.

Tourism Ireland works closely with a wide range of partners. Industry on the island of Ireland and trade in overseas markets are particularly important.

### Access

Regional access is an important element of achieving regional spread, in 2025 however, it is especially important to help mitigate the potential impact of the Dublin airport passenger cap albeit eased by the summer cap pause.

Activity promoting access into regional airports, Northern Ireland and by sea will be strategically scaled. This will focus on point-to-point marketing and investment optimisation in light of route availability.

In recognition of the changing regional aviation environment, we will widen the Corporate Plan rules on co-operative funding to enable core monies to be used to support regional access. This will continue to be delivered on a minimum 10:1 return.

*NOTE: there will be the potential to exempt (in advance) some campaigns from this requirement where the opportunity is considered strategically important, this is particularly relevant to thin routes operated by smaller aircraft where the regional benefit may be higher than the absolute return implies.*

We want to see air connectivity remain solid to all our markets and regional aviation to grow across the island. The Dublin Airport cap has already resulted in readjustment of some access routes, which may not be returned even with the cap currently on hold. For information: Tourism Ireland undertakes access support with both core and jurisdictional funding, the approach and targeted return remain the same although specific aims may vary in line with funding requirements.

We will take access into account in our market investment profile should significant changes occur.

### Strategic Business Partnerships

We will continue to collaborate with multiple business partners with the potential to bring additional visitors to the island of Ireland including continuing to work with the international travel trade to help influence overseas consumers to visit the island of Ireland. Partners include traditional and online tour operators, travel agents including leading consortia and online intermediaries, and websites popular with potential leisure travellers. All activity is managed within a Key Account Management Framework in line with Value Adding Tourism Traits.

We will also work with other business partners with overseas promotion of major events with the potential to drive significant numbers of visitors to the island of Ireland including the Aer Lingus American Football Classic.



### **Content calendar partnerships**

Noted earlier in the plan, we will create a content calendar for publicity and social activities, this will be built alongside a partnerships calendar. This will enable teams to reach out to industry to help sell and tell stories overseas, soliciting compelling content to align with and amplify Tourism Ireland's social and publicity channels.

### **High quality event platforms**

The island of Ireland is known for its high-quality meeting platforms creating valuable opportunities for industry and trade to do business, build relationships and win contracts. In 2025 platforms will support positive commercial opportunities overseas across business events, golf, luxury and beyond, aiding tourism businesses across the island.

Measuring the commercial benefits of event attendance for industry is difficult, often new relationships take multiple meetings to build and existing relationships are kept alive and lucrative through ongoing interactions. Through the course of 2025 we will increasingly measure the impact of the events testing potential measurement methodologies for the upcoming Corporate Plan.

### **Business Events**

In 2025, Tourism Ireland will continue to promote the island of Ireland as an excellent destination for Business Events focusing on meetings and incentives. Business events are often off season, mid week and high value. We will implement an operational plan developed with our island of Ireland industry working group prioritising the creation of platforms for industry to close the sale, with examples including our presence at IMEX with island wide industry partners. We will also expand our digital and PR activities in the Business Events area to make the island of Ireland a top of mind destination for meetings and incentives.

### **Golf**

In 2025, we will roll out a new Golf Strategy developed in collaboration with our colleagues in Fáilte Ireland and Tourism Northern Ireland. This strategy will ensure that every opportunity is maximised as Northern Ireland hosts The Open Championship in 2025 and Ireland hosts the Ryder Cup in 2027. We will develop dedicated golf campaigns that deliver the Value Adding Tourism Traits in terms of high revenue but also driving greater regional and shoulder season business. Knowing golfing visitors spend an estimated 2X what non-golfing visitors spend, the upcoming tournaments are a key opportunity to achieve overseas coverage. Content creation is already underway for distribution through channels such as Sky Sports, the Golf Channel and Golf Digest.

### **Strategic Partnerships**

In 2025, we will continue to take an agile partnership approach towards opportunities in markets where Tourism Ireland does not have a presence through our Asia Hub in Shanghai and Global Partnerships team in Dublin, including close collaboration on Ireland's presence at Expo in Osaka.

## **4. Tourism policy and strategy**

Tourism Ireland will continue to work with both departments in the development and deployment of tourism policy.

The All Island Strategic Tourism Group will enable Tourism Ireland to play an integral role in supporting the development of product, experience and marketing activities across the whole island.

The Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media in Ireland published its new Tourism Policy Framework in 2024. Tourism Ireland will work with the Department and our stakeholders to implement the framework.

Tourism Ireland has also supported the Department for the Economy in Northern Ireland with the development of its Tourism Action Plan. Tourism Ireland will work to support the plan throughout 2025 and beyond once it is finalised. Tourism Ireland is a member of the Tourism Partnership Board.

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.

Tourism Ireland will continue to play a pivotal role in the crystallisation of benefits of the Shared Island programme, Wild Atlantic Way/Causeway Coastal Route “Where two great routes meet”. Additionally, we will advocate to secure similar support / crystallise benefits for Irelands Hidden Heartlands/Fermanagh and further explore opportunities, Irelands Ancient East/Down/Armagh and Home of Halloween.

## 5. Supporting organisational excellence

Our vision for 2025 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.*

### BPI 15

Budget rigour and efficiency: the 2025 with **no priority 1 financial control audit findings**, expenditure +/- 1% variance.

### BPI 16

**Uplift our 2024 employee satisfaction score by 5%**, building on our **Great Place to Work** accreditation.

### BPI 17

Initiate **organisational capacity review** to set up for success in our staffing, structures and upskilling.

## Ensuring rigour and efficiency

**We will ensure that the 2025 accounts will be unqualified with no priority 1 financial control audit findings and that our expenditure is administered in line with +/- 1% maximum unplanned or forecast variance threshold.**

During 2025 Tourism Ireland will review and update our financial procedures manual, as we do annually, evolving to ways of working and governance needs. We will undertake a staff training programme in line with any updated processes.

Ensuring our data, ICT systems and business processes remain robust, secure, and compliant with best practice will be core to the way we do business. Compliance with the Financial Memorandum and best practice Governance codes is paramount to maintaining our corporate reputation.

As outlined in the Corporate Plan, we will seek stakeholder feedback through a survey of industry. This will cover their needs from and feedback on Tourism Ireland, and results will feed into the next corporate plan.

## Living our values

Tourism Ireland has an established set of values around **respect, collaboration, ownership and creativity**. We are constantly working to ensure these are fundamental across our work to ensure we live our values and create a great employee experience.

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

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

We will continue to **invest in our teams on the island and across the world**, with our leadership program and training based on emerging opportunities, including content development and AI.

We will refresh our **People Plan** building on staff sentiment expressed in the Great Places to Work feedback.

During 2025 we will undertake an **organisational capacity review**. This will include input from staff and core stakeholders across all aspects of the review including scoping, onboarding any external partners, setting timelines, and initiating work. The review, which will be tabled with the NSMC for approval as appropriate, will set the organisation up for the future and actions delivered as part of the 2026-29 Corporate Plan.

## 6. Investing wisely

The anticipated available budget for 2025 at the time of writing is:

Investment €m's	2024	2025
Operating Costs	29.7	31.5
Marketing Core	48.6	50.1
Capital	7.4	7.0
<b>Total</b>	<b>85.7</b>	<b>88.6</b>

Funding	2024	2025
TCAGSM	64.0	67.0
DfE	21.7	21.6
<b>Total</b>	<b>85.7</b>	<b>88.6</b>

### Planned Core Marketing Investment

Global Media and Digital	3.6	2.0
Marketing Communications	2.7	5.6
Global Partnerships	2.6	1.7
Strategy & Insights	0.1	0.2

North America	13.2	13.7
Great Britain	11.2	8.5
Mainland Europe	15.2	11.6
Australia and New Zealand	0.8	0.9

Global Projects/Central/Not yet Allocated	0.0	5.8
Finance	(1.0)	0.0
Northern Ireland Stakeholder Engagement	0.2	0.1
<b>Total Core Marketing Investment</b>	<b>48.6</b>	<b>50.1</b>

#### NOTES

- The above figures do not include any jurisdictional spend funded in the calendar year 2025.
- For information, jurisdictional funding can also be provided but is not included in this plan.
- 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.

## 7. 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 2025: *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.

Increase the value of overseas tourism	<p>BPI 1: Increase overseas tourism revenue across the island of Ireland by +5.6%<sup>4</sup> growth per year on average over the period 2024 to 2030.</p> <p>BPI 2: Increase overseas tourism revenue across Northern Ireland BY +6.5% growth per year on average over the period 2024 to 2030.</p>
Supporting economies and communities	BPI 3: Supporting economies and communities through +6.5% revenue growth in Northern Ireland (BPI 3A), in regions (BPI 3B) and in non-peak seasons (October to May) (BPI 3C) per year on average over the period 2024 to 2030.
Sustaining the environment	<p>BPI 4: Run a slow-tourism month focused on car-free travel itineraries to encourage sustainable exploration of the regions of Northern Ireland and Ireland.</p> <p>BPI 5: Establish externally validated measurement of Tourism Ireland's environmental footprint.</p>
Inspiring visitors: Awareness	<p>BPI 6: 1b high quality audio visual 'Opportunities To See' across all consumer marketing (excluding static display ads) in 2025<sup>5</sup>.</p> <p>BPI 7: 1.6b quality 'Opportunities To See' through publicity in Tier 1 media (BPI7A), 500m of which will feature Northern Ireland (BPI 7B).</p>
Inspiring visitors: Consideration	BPI 8: All new brand creative (with media investment >€1Mn and/or Production budget >€400k) to be in the top 30th percentile for Persuasion score – independently measured.
Inspiring visitors: Research	BPI 9: 10m people will research the island of Ireland on Ireland.com during 2025. Measured by Research Visits.
Inspiring visitors: Advocacy	<p>BPI 10: 7.5m followers on social channels by the end of 2025.</p> <p>BPI 11: 70% of content created for social contains regional or seasonal message across scheduled feed posts.</p>

<sup>4</sup> All revenue targets are nominal.

<sup>5</sup> Note this is a changed measure from 2024 which limits OTS to those with a minimum dwell time per video – i.e. greater engagement with the marketing.

Strengthening partnerships	<p>BPI 12: Support 30k meetings between industry and trade overseas, to include 7.5k business events meetings, and 6k golf and luxury meetings.</p> <p>BPI 13: Access campaigns promoted through cooperative marketing to achieve 10:1 ROI on Tourism Ireland's investment.</p> <p>BPI 14: Industry engagement to offer promotional opportunities to 750 island of Ireland businesses, including 250 businesses selling Northern Ireland.</p>
World class team demonstrating integrity	<p>BPI 15: Budget rigour and efficiency: the 2025 audit reports will have no priority 1 financial control audit findings, expenditure +/- 1% variance.</p>
Living our values and growing expertise	<p>BPI 16: Uplift our 2024 employee satisfaction score by 5% and retaining our Great Place to Work accreditation.</p> <p>BPI 17: Initiate organisational capacity review to set up for success in our staffing, structures and upskilling.</p>

## 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 monthly progress summary is prepared and shared in advance of all Board and 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.

## Appendix – A

### Business Plan - Proposed 2025 Budget Allocation - In Euros 000's

Tourism Ireland	Approved Budget 2024			Proposed Change +/-			Proposed Budget 2025		
<i>€1 = 0.86GBP</i>	Resource	Capital	Total	Resource	Capital	Total	Resource	Capital	Total
Programme	48,642	7,385	56,027	1,505	(345)	1,160	50,147	7,040	57,187
<b>Total Programme Expenditure</b>	48,642	7,385	56,027	1,505	(345)	1,160	50,147	7,040	57,187
Pay Costs	17,050	0	17,050	1,050	0	1,050	18,100	0	18,100
Non-Pay Administration Costs	10,950	603	11,553	350	387	737	11,300	990	12,290
<b>Total Admin Costs (excl. Pensions)</b>	28,000	603	28,603	1,400	387	1,787	29,400	990	30,390
<b>Total Programme &amp; Administration Expenditure, excl. Pension Costs</b>	76,642	7,988	84,630	2,905	42	2,947	79,547	8,030	87,577
<i>NI share representing 25%</i>	20,798	948	21,746	805	(948)	(143)	21,603	0	21,603
<i>IRL share representing 75%</i>	55,844	7,040	62,884	2,100	990	3,090	57,944	8,030	65,974
Pension costs – NI representing 20%	291	0	291	(16)	0	(16)	275	0	275
Pension costs – IRL representing 80%	1,100	0	1,100	0	0	0	1,100	0	1,100
<b>Overall Total Expenditure for approval</b>	78,033	7,988	86,021	2,889	42	2,931	80,922	8,030	88,952
<i>Total NI share, including pension costs</i>	21,089	948	22,037	789	(948)	(159)	21,878	0	21,878
<i>Total IRL share, including pension costs</i>	56,944	7,040	63,984	2,100	990	3,090	59,044	8,030	67,074
Existing/Projected Staff Numbers (FTE)	168						168		



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

	<b>NI</b>	<b>IRL</b>
Pension/benefit costs for N/S Body service*	275	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
<b>Total costs of pensions/benefits included in Business Plan</b>	<b>275</b>	<b>1,100</b>

\*Please complete as applicable

## Appendix B

Expected out-turn of 2024 Business Plan targets is as follows.

*NOTE: At the time of writing data is only available for performance in H1 (January-June 2024).*

### Increase the value of overseas tourism

<p>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.</p> <p>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.</p>	<p><i>Baseline is agreed.</i></p> <p><i>Data on 2024 performance is yet to become available.</i></p> <p><i>Initial data for Ireland (only) indicates that this target is very likely to be achieved.</i></p>
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### Supporting economies and communities

<p>BPI 2 - 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>	<p><i>Baseline is agreed for Northern Ireland.</i></p> <p><i>Data on 2024 performance and regional/seasonal baseline is yet to become available.</i></p>
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### Sustaining the environment

<p>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.</p>	<p><i>Fáilte Ireland, Tourism Northern Ireland and Tourism Ireland worked to create an all-island scheme however, this is on hold due to updated legislation requirements. It is now unlikely to be in place during the Business Plan period and therefore the communications plan development is on hold.</i></p>
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### Inspiring visitors

BPI 4A - <b>Awareness:</b> 1.3 billion quality audio visual ‘opportunities to see’ across all consumer marketing (excluding static display ads) in 2024	<i>In H1, 1.5b Opportunities To See have been achieved. Ahead of target.</i>
BPI 4B - <b>Awareness:</b> Deliver 1.545 billion quality ‘opportunities to see’ through publicity (in Tier 1 Media), 500m of which will feature Northern Ireland.	<i>In H1, 1.1b Opportunities To See have been achieved. Expectation is that target will be achieved by year end. In H1, 500m Opportunities To See publicity related to Northern Ireland was achieved. Expectation is that by year end this will be above target.</i>
BPI 5 - <b>Consideration:</b> 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.	<i>Brand lift surveys completed in market on H1 campaigns average a +9.2% uplift. Expectation is that this level of uplift will continue throughout the remainder of 2024 surveys continue to be underway.</i>
BPI 6 – <b>Research:</b> 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.	<i>In H1, 5m Net Usable Web Visits were achieved. Expectation is we will meet target by year end.</i>
BPI 7 – <b>Advocacy:</b> 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.	<i>By H1, 6.7m followers are recorded. Expectation is we will meet target by year end.</i>

### Strengthening partnerships

BPI 8 - <b>B2B events:</b> Support 25,000 meetings between industry and trade throughout 2024, including 7,500 Business Events’ meetings and 4,000 Golf and Luxury meetings.	<i>By H1, 21,000 meetings including 4,000 Business Event meetings and 3,500 Golf or Luxury meetings have taken place. Expectation is we will meet target by year end.</i>
BPI 9 – <b>Co-operative campaigns:</b> All co-operative campaigns to achieve a 10:1 return on Tourism Ireland’s investment.	<i>Median return is 30:1, while there is some variance by route, the overall return is above expectations.</i>
BPI 10 – <b>Industry engagement:</b> During 2024 at least 750 island of Ireland businesses, including 250 from Northern Ireland to benefit from Tourism Ireland engagement.	<i>By H1, 500 island of Ireland and 120 Northern Ireland unique industry partners have engaged with Tourism Ireland. Expectation is we will meet target by year end.</i>

### World class organisation

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.	<i>No priority 1 items arising in any of the audits concluded in 2024 to date. On target to deliver +/- 1% budget variance</i>	
BPI 12 – Achieve Great Places to Work certification again in 2024, with an increase in average satisfaction by +8 percentage points on 2023.	<i>Progress being made on the people plan, however the Great Place to Work survey will not be completed until Q3 2024.</i>	

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

## Appendix C

### 2023-2025 Corporate Plan – update on key performance indicators

In 2024 Tourism Ireland made good progress towards the ambitions set out in our Corporate Plan. The ambitions remain valid and the 2025 work programme has been designed to progress the plan into its final year.

(R = revised)

#### Economic

CPI 1R - In line with our goal to grow inbound tourism revenue on average by +5.6% per annum out to 2030, we will target the same level of growth over the Corporate Plan period (on 2023 base).	<i>Data is yet to become available to assess this CPI in detail. The data that is available at time of writing is positive, however more data is required before assessing success.</i>
CPI 2R - In line with our goal to grow inbound tourism revenue to Northern Ireland on average by +6.5% per annum out to 2030, we will target the same level of growth over the Corporate Plan period (on 2023 base).	<i>Data is yet to become available to assess this CPI.</i>

#### Social

CPI 3R - In line with our goal to grow inbound tourism revenue to the regions of Ireland (outside Dublin) on average by +6.5% per annum out to 2030, we will target the same level of growth over the Corporate Plan period (on 2023 base).	<i>Data is yet to become available to assess this CPI.</i>
CPI 4R - In line with our goal to grow inbound tourism revenue in October to May on average by +6.5% per annum out to 2030, we will target the same level of growth over the Corporate Plan period (on 2023 base).	<i>Data is yet to become available to assess this CPI.</i>

#### Environmental

CPI 5 - By 2025, prioritise the promotion of IOI sustainably certified industry (subject to scheme agreement)	<i>Fáilte Ireland, Tourism Northern Ireland and Tourism Ireland worked to create an all-island scheme however, this is on hold due to updated legislation requirements. It is now unlikely to be in place during the Corporate Plan period.</i>
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### Markets

CPI 6R – Removed.		
CPI 7 - A Mainland European assessment which will identify the best opportunities for sustainable growth to be completed by end of Q1 2024	<i>The Mainland Europe Appraisal will be completed early 2025.</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. Initiation of the Australia/NZ assessment will be considered in 2025.</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 2025.</i>	
CPI 11 - All co-op activities to demonstrate at least a 10:1 return on investment	<i>Median return is 30:1, while there is some variance by route, the overall return is above expectations.</i>	

### Organisational

CPI 12 - Diversity & inclusion plan completed by end of 2023	<i>A Diversity and Inclusion plan is now in place. Tourism Ireland has also received accreditation from the National Centre of Diversity having got the Investors in Diversity bronze award.</i>	
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>	
CPI 14 - Develop a new marketing effectiveness metric for 2024 activity	<i>Tourism Ireland's vision and new BPIs enable greater monitoring of marketing effectiveness, this will continue into 2025.</i>	
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. 2024 staff survey is underway in Q4.</i>	
CPI 16 - Track the reputation of Tourism Ireland on the island of Ireland by 2025	<i>Scheduled for 2025.</i>	
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 – on-track or completed / Amber – in-progress but delayed / Red – unlikely to be completed / Grey – changed/n/a]*