

## **2026 Business Plan**

### ***Competing to Win – Year One***





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## 01 Executive Summary and Tourism Context

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Inbound tourism is a significant export industry with an estimated €6.3B/£5.5B spent by international visitors across the island of Ireland in 2025 supporting 300,000 jobs<sup>1</sup>.

Tourism Ireland has an ambitious plan to support the industry throughout 2026 in line with our 2026-2028 Corporate Plan, Ireland's Tourism Policy Statement 'A New Era for Irish Tourism' and Northern Ireland's Tourism Vision and Action Plan.

Our vision to *win value adding visitors to the island of Ireland, benefitting businesses, communities and place* is supported by a set of business objectives. In 2026 our work will support these priorities and deliver an average 6% annual overseas visitor spend growth from 2026 to 2031 across the island.

### Tourism Ireland's Business Objectives

#### Grow strategic source markets

Achieve growth across market regions, deepening & defending in US, diversifying in Mainland Europe & Canada, growing Great Britain from strong foundations and unlocking nascent markets through partnerships.



#### Compete to win value adding visitors

Tourism Ireland will win visitors through an elevation of tourism brand Ireland, utilising our icons of landscape, culture and history, linking in with emotional connections and cutting through with effective creative, media and publicity across markets.

#### Year-round, grow tourism across gateway cities, regions and Northern Ireland

Utilising a comprehensive content calendar, promote seasonal, regional and Northern Ireland content consistently, effectively and at appropriate times to promote visitation.

#### Strengthen go-to market with partnerships of the future

Leverage access, intermediary and business partnerships to maximise sales opportunities for industry overseas. Undertake an Intermediaries Appraisal to develop the most effective approach. Support local tourism SMEs island-wide with opportunities to scale with overseas visitors.

#### Sustainable tourism respecting communities and place

Build on the success of **Ireland Unrushed** with slow tourism promotion. Be a good citizen by measuring and reducing our own environmental impact.

#### World class team, innovating for impact and living our values

Tourism Ireland will support strong teams with a culture of innovation, learning and collaboration. In the course of the plan, we will undertake an organisational capacity review to support resourcing and optimise the structure for success for the future.

## Business Performance Indicators 2026

Grow Strategic Source Markets	<p>+6% revenue year on year average from overseas island wide to achieve €10.25B/£8.9B by 2031.</p> <p>Each overseas Market Area to contribute growth in 2026, through increased activation in line with market diversification.</p>
Compete to win value adding visitors	<p>Advertising drives &gt;1.2B quality 'Opportunities to See', with effective reach and frequency to drive consideration among elevated audiences.</p> <p>Publicity with top tier publications with journalists, content creators, broadcast and streaming channels drives 1.6B opportunities to see, including 550M for NI.</p> <p>Elevate Tourism Brand Ireland – new brand creative in top quartile for Persuasion Score.</p> <p>Launch consumer marketing activities in line with an island of Ireland Approach to the new Culinary Tourism Strategy.</p> <p>Research: 12M engaged sessions on Ireland.com, as visitors discover things to see and do. Website optimised for GenAI.</p> <p>Advocacy: achieve &gt;500K social engagements per month and maintain 7.5M+ followers across social channels.</p>
Year-round, grow tourism across gateway cities, regions and NI	<p>+6.5% revenue year on year average from overseas to Northern Ireland.</p> <p>Refresh overseas positioning of gateway cities, Experience Brands / regions with 'icons' that drive growth and dispersal.</p> <p>Drive off peak growth with Home of Halloween, St Patrick's Day, Winter Breaks.</p> <p>+6.5% visitor revenue growth year on year average: regions and off peak.</p>
Strengthen go-to market through partnerships of the future	<p>Connect this island to key strategic markets with access partners. 15:1 ROI through co-operative marketing driving visitor uplift.</p> <p>Create global spotlight for industry with B2B / B2C promotion for &gt;1,000 tourism SMEs, 333 selling NI.</p> <p>Enable 35K commercial meetings between local industry and overseas trade; 7.5K focused on business events. Meetings to deliver €300M business pipeline.</p> <p>Complete Intermediaries Appraisal.</p> <p>Win visitors through sporting events, golf marketing to leverage Irish Open and upcoming Ryder Cup and leverage American Football opportunities.</p>
Sustainable tourism respecting communities and place	<p>Develop Ireland Unrushed driving 'slow tourism' with at least 3 new creatives showcasing slow tourism itineraries.</p> <p>Factor 'revenue per carbon footprint' into market opportunity mapping.</p> <p>Deliver 'good citizen' plan for Tourism Ireland's footprint.</p>
World class team innovating for impact and living our values	<p>Expenditure for the year not to have an unplanned variance of more than +/-1% of the total BP expenditure for the year, no priority 1 audit points.</p> <p>Achieve Great Place to Work accreditation with constant improvement achieved by actioning feedback for example, 'Thrive Together' coaching roll-out, innovation fund and 'efficient systems' review.</p> <p>Organisational capacity review provides roadmap to support staffing, structures and upskilling.</p>



## 02 Our Mandate, Mission and Vision

Tourism Ireland was established under the Belfast Agreement of Good Friday 1998 with a clear mandate to **‘increase tourism to the island of Ireland and support Northern Ireland to realise its tourism potential’**. Growing the value of overseas tourism brings ‘export’ incremental revenue to these shores (€6.9B / £6B in 2024).

In 2025 inbound tourists are expected to have spent around €6.3B / £5.5B across the island of Ireland.

2026 is the first year of Tourism Ireland’s new Corporate Plan. Within our Corporate Plan, our mission and vision are restated, and our 2026 Business Plan sets out an ambitious programme of activity to achieve these goals.



Competing effectively at today’s price point will be vital in 2026 as capacity pressures continue and macro-economic uncertainty remains.

The island of Ireland is well placed to compete; famed for its greenery, landscapes and world class tourism product.

While competing strongly overseas we must respect our environment and sense of place through responsible tourism, avoiding over-tourism sentiment or damage to valued environments.



## 03 *Review of performance against the 2025 Business Plan*

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The island of Ireland is expected to welcome over 8M inbound tourists during 2025, together spending €6.3B/£5.5B across the economy. Inbound visitors spread widely across the island and support around 300,000 jobs<sup>1</sup>.

The year has not been without challenges, in 2025 a number of factors including macro-economic uncertainty and the Dublin Airport cap impacted visitor numbers and spend relative to 2024 growth. Visitors and spend are however holding up when compared with 2023, with opportunity ahead for growth into the future.

Guided by the 2025 Business Plan, Tourism Ireland, supported by our sister agencies and industry, was able to successfully promote the island of Ireland around the world.

A full assessment of the 2025 Business Plan targets and the outcomes achieved is included in Appendix A.

In 2025:

- An expected 8.1M overseas tourists will have visited the island of Ireland spending €6.3B/£5.5B in the economy and supporting around 300,000 jobs.
- Promotional activity across the world drove demand for the island of Ireland through the **'Fill Your Heart with Ireland' brand campaign**, ensuring high levels of awareness, growth in interest and ultimately booking.
- Our campaigns created demand around the world with over 1.6B opportunities to see promotion for a holiday on the island.
- Strategic routes to the island increased with **+3% more air seats** on non-sun routes when compared to 2024<sup>1</sup>.
- Ensuring future messaging is as compelling and persuasive as possible, we **on-boarded a new global creative agency** to develop new campaigns and content with the first campaign ready for 2026 activity.
- Embraced **responsible Artificial Intelligence** (AI) to optimise media placement, using millions of real-time signals to deliver the right message to the right targets at the right time.



- To deliver the message efficiently and accurately we **re-tendered Tourism Ireland's media agency contract**. The successful agency will deliver effective, data-driven media plans aligned to Tourism Ireland's vision.
- **Tourism Ireland's overseas consumer segmentation** was fully operational across our work efficiently targeting those most persuadable to visit the island of Ireland sustainably.
- **Demand generation** that encouraged greater access opportunities to mitigate the impact of the Dublin Airport cap was prioritised, with an emphasis on Northern Ireland and regional Ireland opportunities.
- The **Mainland Europe Appraisal** was completed, with implementation of its recommendations underway to accelerate growth and market share.
- A compelling content calendar stimulated **season extension** giving visitors reasons to travel achieving both seasonal and regional spread. Tourism Ireland promoted 'must visit' moments including TradFest, St Patrick's Day and key seasonal themes. Our **Home of Halloween campaign** for example created 2X the recognition of Halloween's Celtic origins on this island with 7/10 more likely to want to visit.
- **Slow-tourism month** was launched in June with the **Ireland Unrushed campaign**. The campaign reached >100M people<sup>2</sup>, with strong 'persuasion scores' at >90% indicating ability to change mindsets<sup>3</sup>. The campaign encouraged visitors to slow down and enjoy more, through dwell time in nature and communities and saw an increase in people around the globe searching for the island of Ireland online. It promoted alternative means of transport and sustainable experiences, helping those visitors who don't use a car (>50%) to explore more<sup>4</sup>.



- Our regional promotions encourage demand generation right across the island and have helped to support the **Wild Atlantic Way** to become one of the world's most Instagrammed routes, with 1.9M mentions, second only to route 66 in the US, per a 2025 study by Cinch.



- Through the **programming fund**, Tourism Ireland innovated radically to co-produce TV and streaming productions through co-operative funding for shows that would immerse audiences in long form content promoting the island.

- **Ireland.com was redesigned to enhance the consumer experience** accelerating 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.

- Supporting local tourism industry, Tourism Ireland facilitated **>750 SMEs and local industry partners** to build connections overseas, through trade partnerships and industry events leading to over **30,000 meetings**. Positive return on investment and co-funding by local businesses demonstrated the value generated<sup>5</sup>.



- **Supporting Northern Ireland to achieve its tourism potential**; we maximised key events such as The Open in July 2025 to attract overseas visitors. We co-produced documentaries and travelogues which aired around the world in addition to our advertising and partnership support. ‘Beautiful landscapes and scenery’ is now the top attribute referenced when overseas audiences are asked what they connect with a holiday in **Northern Ireland** (overtaking ‘the Troubles’ as the primary association overseas audiences have)<sup>4</sup>.

- We conducted a comprehensive **social channel audit and established a new social video strategy**, leveraging the opportunity to bring inspiring creative to audiences on a daily basis, helping create a platform for regional content.





## 04 Strategic Overview and Goals

Tourism Ireland's vision is to 'win value adding visitors to the island of Ireland, benefitting business, communities and place'.

Our 2026-28 Corporate Plan sets out how Tourism Ireland will deliver impact, collaborating with government sponsors, sister agencies and private industry at home and overseas. Overseas marketing will drive an increase in desirability, target the right value adding visitor segments, leverage opportunities in accommodation and connectivity and help to mitigate risks to the tourism industry.

Together with industry and wider stakeholders we will grow visitor spend island wide on average by ~6% per annum to 2031, powering growth from €6.9B / £6B in 2024 to €10.25B / £8.9B. The island of Ireland's ambition will support the €9B by 2031 level set in Ireland's Tourism Policy Statement. Northern Ireland will grow at a faster average annual rate of ~6.5% per year on average helping to realise its tourism potential. This will support doubling the value of inbound visitor spend by 2035, from £633M to £1.3B.

Reflecting the regional and seasonal priorities, we will grow revenue outside of Dublin and outside of peak months by +6.5% per year on average to 2031.

Business Objectives:



The Corporate Plan outlines a series of risks and opportunities which contextualise growth over the coming years. Specifically relating to 2026, key risks and opportunities are:

- Connectivity will be essential, with tourism growth correlated to connectivity growth, and with the Irish government's commitment to resolving the Dublin Airport cap valued by industry. An aviation policy for Northern Ireland is to be launched, and there will be a review of Ireland's Aviation Policy and Regional Airports Programme, which would be welcome to continue to support air access as the transport of choice for 90% of visitors.
- Macro-economic uncertainty in a number of key source markets, notably relating to the dollar/euro exchange rate and economic conditions in the US and Great Britain. In our recent Sentiment Tracker Research 37% of our US target audience consider it too uncertain to book at present<sup>4</sup>.
- High-cost environment for industry leading to perception of high ticket price for an island of Ireland holiday is especially impacting on the appeal for European visitors where up to 1 in 5 of our target audience consider themselves to be struggling financially.
- Potential capacity constraints in the regional accommodation sector.

The 2026-28 Corporate plan outlines in detail how Tourism Ireland will compete to win working across each pillar. In 2026, we will begin this work and have outlined this in the following section.





## 05 Business Objectives and Activities

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In support of our vision to *win value adding visitors to the island of Ireland, benefitting business, communities and place*, our proposed activity in 2026 is outlined against each of the Corporate Plan business objectives.

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### **Business Objective 1: Grow strategic source markets**

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Working towards the balanced growth portfolio aim set out in the Corporate Plan, Tourism Ireland will use a data-based approach to hone our activity, focusing on highest prospect opportunities. In 2026 our activity will support our objective to:

- **Deepen and defend US:** Contributing almost 30% of island of Ireland visitor revenue<sup>1</sup>, the US market is critical for industry success. The island of Ireland is attractive to US visitors with high return on investment of our activity and strong demand (8 out of 10 of our US target audience are interested in visiting)<sup>4</sup>. Any risk to the US however, is a risk keenly felt by tourism businesses island wide.
- **Diversify growth with Mainland Europe & Canada:** Mainland European markets contribute 32% of total visitor spend to the island, with spend sourced from over 10+ markets with cultural and language nuances to account for. Tourism Ireland's recently completed Mainland Europe Appraisal outlines a strategy to achieve step change growth from these markets with additional investment.

Air access forecasts for 2026 are positive with further route expansion expected and building on 2025 new routes such as Nashville, Indianapolis, Denver and Detroit<sup>6</sup>.

**In 2026** Tourism Ireland will strategically cultivate tourism from selected new gateways, alongside core advertising, publicity, social, digital and partnership activities, based on available budget. Our team in North America will increase to ensure we fully capitalise on the ongoing opportunity.

**In 2026**, Tourism Ireland will put in place the recommendation of the Mainland Europe Appraisal reimagining campaigns in France, Germany and beyond with tailored communications to elevate perceptions of the island of Ireland.

Our activity will focus on value adding visitor cohorts (those with the funds to travel, who look beyond sun holidays, and are motivated by exploration), highlighting second holiday itineraries, and encouraging visitors to go to 'plus one' destination beyond their gateway city.

Tourism Ireland's Mainland Europe Appraisal outlines an exciting growth opportunity which can be unlocked with investment. Continued investment will enable tailored communications, always-on, targeted at value adding visitors. Continued investment is required to meet the targets outlined in the plan – growing Mainland Europe visitor spending from €2B/£1.7B in 2024 to €3B/£2.6B by 2031 (c.€300M/£260M ahead of independent forecast).

**Canada** is the 5<sup>th</sup> largest market in terms of visitor spend for the island of Ireland and was the one of the fastest-growing markets for Ireland in 2024; indications for 2025 are for continued growth with year to August growth in visitors of +4%.

**In 2026** we will continue to accelerate Canada as a high-value future market and source of diversified visitor spend.

- **Grow Great Britain from strong foundations:** Visitors from Great Britain contribute 26% of visitor spend and 46% of visitors to the island. Visitors from Great Britain bring particular value to Northern Ireland, representing the largest visitor revenue market.

**In 2026,** Tourism Ireland will maintain current levels of investment. Our work will include consumer marketing campaigns, publicity and broadcast impact, with social and digital presence, air and ferry co-operative marketing, and partnership activities with tour operators and travel trade. Creative focus for Northern Ireland and regions of Ireland will continue to be applied in Great Britain due to the greater awareness and appetite for more geographically detailed messaging.

- **Unlock nascent markets through partnerships:** strong opportunities exist in key nascent markets. We will work with industry to target high value prospects where the revenue return outweighs the distance travelled to the island. Tourism Ireland's Global Partnerships team will support industry activity and overseas tour operators in nascent markets ensuring that Team Ireland/Northern Ireland can compete and win.

**In 2026,** we will upweight our presence in Asia with a focus on business partnerships that can unlock value adding visitor segments. We will deploy a strategic access fund where there are new routes that, through co-operative marketing, can support tourism at scale including but not exclusively nascent market opportunities.



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## ***Business Objective 2: Compete to win value adding visitors***

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**Win value adding visitors** - win visitors with 'high value, high fit' for the island of Ireland, defined as those who a) have funds to invest in travel b) seek authentic experiences, c) explore across regions and seasons d) respect communities and place.

**Elevate Tourism Brand Ireland to compete effectively:** the perception of what the island offers must be elevated to compete effectively with the world's most aspirational destinations at today's price point, tackling outdated perceptions and increasing desirability.

**In 2026**, we will launch a new overseas brand campaign delivering assets that achieve high persuasion scores with target audiences, moving the dial on the attractiveness of the island of Ireland when paired with consistent publicity, social and digital activations.

The new campaign will be the first with our new creative agency. It will focus on expanding the impression of the island as a holiday destination with *only in the island of Ireland* experiences and compelling imagery and content to suit the needs of our value adding visitor audience. Initial testing of the campaign concept is positive with 95% of all audiences surveyed stating the concept will encourage them to search for a holiday to the island of Ireland online<sup>7</sup>.



- **Compel high value visits through iconic uniqueness:** drive desirability through iconic aspects of our landscape, culture and history.

**In 2026,** we will use our content calendar to create global opportunities to promote our icons of landscape, culture and history throughout the year.

#### **Icons of Landscape**

(landscapes are the most prominent reason visitors indicate they choose the island)

#### **Icons of Culture**

(building on our screen tourism success and cultural opportunities)

#### **Icons of History**

(Celebrating the richness of our heritage — from Brigid's Day and St Patrick's Day to the 'Home of Halloween')

**In 2026,** we will leverage data to define the icons of landscape for each of the island's five experience brand areas that best drive visitor engagement in overseas marketing.

**In 2026,** we will continue to use screen tourism and the programming fund to deliver the island's unique 'visitable' culture into homes across the world.

We will participate in the development of the new Culinary Tourism Strategy and roll out an island of Ireland **Culinary Tourism Approach**, tackling outdated perceptions of what Irish food offers and showcasing the freshness and diversity of food and drink on the island as an important aspect of destination choice, particularly for Europeans, where perceptions have most headroom for growth.

**In 2026,** we will ensure festivals linked to our heritage are marketed overseas to deliver visitors, across the year.

We will incorporate peace tourism into our web materials, and relevant press trips connecting interest in the journey to peace, post-Troubles, with places to visit, from museums like the Ulster Museum or Monaghan Peace Campus to city tours.

- **Convert emotional connections** to visitation in diaspora audiences, through strategies that act as an ongoing 'Invitation', motivating those with affinity and/or links to the island to visit.

**In 2026,** we will lean into specific moments of relevance, such as America 250 for the island, and Northern Ireland. We will highlight through publicity, social storytelling and partnerships, places to visit for diaspora with an interest in how migration from these shores shaped the US.





- **Cut through in today's channels:** our activity must reach value adding visitors with appropriate media placement, reach and frequency. Tourism Ireland measures every campaign based on its ability to deliver marketing metrics, with that marketing impact ladder up to return on investment.

**In 2026, we will deliver:**

**Publicity** to reach 1.6B 'opportunities to see' including 550M with Northern Ireland messaging in tier 1 respected publications, journalists, content creators and broadcast and streaming channels, in order to drive perceptions of our destination as 'worth it' with our audience. Outreach will include winning press trips, circulation of newsworthy stories, and co-production and support of broadcast TV shows, with increased output targeted to Mainland Europe, in line with market diversification goals.

**Advertising** of our island destination, to reach >1.2B 'quality opportunities to see', targeted to reach and frequency within our audience per brand campaign, in order to cut through and drive active consideration in highly targeted audiences.



**Consideration** driving creative, will achieve persuasion scores in the top quartile, indicating ability to change mindsets and dial up intent to visit.

**Research** to win visitors to the island of Ireland will be supported by 12M engaged sessions or deep research visits to our website, Ireland.com, optimising the website to support longer, deeper sessions for those who navigate to the site, and to support generative AI answers (ChatGPT) for those seeking holiday advice on AI platforms.

**Purchase** occurs with industry partners, from airlines to tour operators to accommodation providers, attractions or activity providers, supported through partnerships by Tourism Ireland.

**Advocacy** from fans online helps to drive consideration among those fans own social circles. Sustain an online follower community of over 7.5M across social channels, and achieve social engagements at >500,000 per month, creating year-round 'talkability' for the destination.



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### ***Business Objective 3: Year-round, grow tourism across gateway cities, regions and NI***

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**Year-round tourism:** Investing to support year-round opportunities, based on available budget, Tourism Ireland will promote a 14 calendar of reasons to visit, from Brigid's Day to summer outdoor activities, to autumn and winter breaks and attractions.

**In 2026,** notable calendar moments will include:



**St Patrick's Day:** Iconic greenings, news partnerships and promotional materials around St Patrick's Day will drive bookings for the summer season and beyond, at a time when we can ensure the island of Ireland is top of mind overseas.



**Home of Halloween:** Promotional materials across markets featuring history, heritage and things to see and do in the Autumn season will target building to **€60M / £52M** in overseas visitor spend annually, within 5 years.



**Winter breaks:** Tourism Ireland will roll out winter break promotions across markets winning visitors to world class attractions, social and cultural experiences.

Through the implementation of the **Mainland Europe Appraisal** an increased focus will be placed on second and third holidays which have a wider seasonal spread.





### Grow the value of tourism across regions:

Tourism Ireland will target faster growth across regions at +6.5%, outpacing overall momentum.

### In 2026 we will:



**Leverage Experience Brands** and destination plans created by sister agencies. Through Brand Collaboration Group connections across agencies, ensure newly developed product on the ground is leveraged in compelling overseas communications to win visitors.



**Regional connectivity:** as part of Tourism Ireland's core marketing focus, collaborate with air and sea partners to inspire demand for new routes that benefit regional access.



**Market compelling regional 'icons'** i.e. visuals of things to see or do in regions like Ireland's Hidden Heartlands or the less visited parts of the Wild Atlantic Way or Ireland's Ancient East that win high engagement from overseas audiences. Package icons or itineraries by region that compel interest overseas and provide consistent marketing, giving visitors reasons to slow down and dedicate stays in lesser visited areas.



**Sustainable tourism respecting communities and place** will include slow tourism marketing, with dwell time in nature and communities in the regions of Ireland, as part of an island wide focus on ensuring tourism is viewed as a force for good.



**Regional publicity and promotions:** ensure dedicated press, trade and advertising coverage for regions in markets with greatest potential per region, supported by the market twinning initiative. Leverage digital and social channels to provide deeper information on things to see and do, from angling to surfing to historic sites.



**Win regional meetings and incentive travel** through strong partnership with local industry, included appropriately within overseas events and communications.



**Support local tourism SMEs** from the regions, providing a platform through marketing activities in overseas markets.

**Market gateway cities and dispersal:** Visitors typically start their visits in cities and many only visit one place.

**In 2026,** we will refresh the competitive positioning of cities to win visitors to the island, including reasons to travel beyond that one gateway. Pursue 'plus one' strategies identified in the Mainland Europe Appraisal (to stretch off-season city breaks to 'plus one' more place, for example travelling from Cork to Kinsale, from Dublin to Kilkenny or Athlone, from Dublin to Belfast, or from Belfast to Derry~Londonderry, so that visitors can enjoy trips to cities with additive experiences, supported by easy transport connections).

**Focused strategies for Northern Ireland:** with ~10X visitors showing interest in visiting Northern Ireland since 2002<sup>4/8</sup>, and one quarter of all visitors to the island now including time in Northern Ireland, with landscape and scenery as the primary draw, there is opportunity ahead for accelerated economic impact. Strategies relevant to Northern Ireland are included throughout this plan, and in the interests of a clear summary on key actions, the 2026 activities are also listed here.

**In 2026 we will:**



**Drive visitation through Northern Ireland dedicated creative:** focused on highest opportunity markets, based on existing importance, demonstrated growth potential, and direct access routes.



**Diversify markets for Northern Ireland:**

account for the importance of Great Britain as the largest visitor spend contributor today, with the highest growth (2024) for Northern Ireland contributed by North America. Mainland European markets with direct air access represent opportunities for short breaks, while Northern Ireland industry partners seeing growth from nascent markets will be supported by Tourism Ireland through our partnership approach.



**Connectivity:** direct connectivity to Northern Ireland is strategically beneficial, particularly in light of the ETA, and Tourism Ireland will stimulate demand for new routes through focused co-operative marketing with air and sea partners.





**Foster greater visitation to regions of Northern Ireland:** Tourism Ireland will undertake marketing overseas according to experience brand and destination stewardship plans developed with Tourism Northern Ireland (and any other relevant stakeholders).



**Win meetings and incentive travel for Northern Ireland** through strong partnership with local industry, included appropriately within overseas events and communications.



**Increase the value of overseas tourism** by winning value adding visitors through advertising, publicity, programming co-productions, social and digital channels, with overseas tourism publicity for Northern Ireland to achieve ambitious dedicated targets each year.



**Leverage appeal of Northern Ireland** through icons of landscape, culture and history. Develop targeted peace tourism marketing overseas, amplifying cross-community storytelling supported on the ground by Tourism Northern Ireland. Leverage diaspora opportunities, for example, celebrating Ulster connections with the US as America 250 is celebrated in 2026.



**Sustainable tourism respecting communities and place** will include slow tourism marketing, with dwell time in nature and communities in Northern Ireland, as part of an island wide focus on ensuring tourism is viewed as a source for good in local communities, with options for sustainability conscious consumers.



**Support local tourism SMEs** from Northern Ireland, providing a platform through marketing activities in overseas markets to an increased number of businesses in the course of the plan.



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## ***Business Objective 4: Strengthen go-to market with partnerships of the future***

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**Connect this island to the world with air and sea partners:** Tourism Ireland will play an active part with airlines and airports, ferry operators and seaports to secure and exploit the potential from new routes with inbound relevance.

**In 2026,** co-operative marketing with partners will achieve an average 15:1 return on investment in terms of spend generated from incremental visits. Partnership at route planning events around the world will ensure a long-term view on potential global connections.

### **Create global spotlight for tourism SMEs:**

**In 2026,** facilitate >1,000 tourism SMEs per year with B2B and/or B2C promotion, including >333 selling NI. Ensure access to overseas data and analysis, helping to facilitate overseas opportunities. Examples of partnership with SMEs will range from featuring local businesses in social posts or TV productions that will inspire demand or hosting local businesses at overseas events to connect them with tour operators who can bring visitors at scale to them for the future.

**Win business events strengthening tourism and the knowledge economy:** Tourism Ireland will create overseas platforms that facilitate local island of Ireland businesses selling to leading event organisers and trade in overseas markets, with the goal of supporting +8% business events revenue on average year over year.

**In 2026,** Tourism Ireland will support **35K commercial meetings** between local industry and overseas 'business events' trade through the 'Meet in Ireland' platform at overseas events such as IMEX and IBTM.

**Foster partnerships that can bring value adding visitors at scale:** Tourism Ireland has world class partnerships teams across markets influencing overseas partners to maximise opportunities for the island of Ireland.

**In 2026,** Tourism Ireland will carry out an Intermediaries Appraisal in order to optimise our business development focus and drive results with all relevant high value partners of the future. Through events where we facilitate commercial meetings between local tourism businesses and overseas travel trade, we will target **€300M / £260M** in business pipeline.





**Win value adding visitors through partnership with major sports & cultural events:** In addition to promoting a wide range of activities such as hiking, water activities (boat trips, kayaking, angling), Tourism Ireland will generate demand overseas for milestone sporting and cultural events in 2026, which have the potential to stimulate travel from high value visitor segments.

**In 2026,** Tourism Ireland will lead overseas activations around American football opportunities, and golf to support overseas interest in the Irish Open, Walker Cup and upcoming Ryder Cup in 2027.

**Tourism Ireland is a key team player for the island:** Tourism Ireland is proud to play an active and committed role for Team Ireland and Northern Ireland, promoting the island through NSMC approved strategies, to support sponsor departments' tourism objectives as outlined in policy documents and to benefit broader economic goals, through the halo effect of positive connectivity and branding.

**Shared Island:** projects in the tourism space will be fully supported through Tourism Ireland's ownership of overseas marketing for on the ground product development.

**In 2026,** we will launch broadcast publicity series 'Dermot's Taste of Ireland' on ITV in Great Britain, promoting 'Coast to Coast' travel in the North West to millions of viewers, through immersive long form content. We will collaborate with sister agency partners on upcoming border region developments at Cuilcagh, Sliabh Beagh and Carlingford Lough.



## *Enabling Business Objective 5: Sustainable tourism respecting communities and place*

Sustainability is a responsibility and an opportunity. Tourism supports society through its ability to provide quality employment across all areas of the island. It is also a force for good creating connections between communities and ensuring a welcome for all.

The environment and landscape are a primary selling point for the island and must be treated with care. As an island, we recognise that there is a carbon footprint associated with transporting visitors to us.

Responsible tourism growth can help maintain and develop a sense of place, as well as care for communities.

**Slow tourism and ‘On the ground’ transport:** supporting communities across the whole island of Ireland and encouraging the use of easier ‘low impact, high benefit’ travel.

**In 2026**, we will continue to build on the success of **Ireland Unrushed** in driving interest in nature and longer stays across regions following the success of the 2025 campaign, featuring the Shannon-Erne Waterway, less visited parts of the Wild Atlantic Way, coastal Belfast, coastal Dublin and the Causeway Coastal Route. New destinations will be added to the campaign. With a third of potential visitors reporting that extreme weather is influencing their destination choice, we will leverage ‘coolcation’ trends to win visitors to the island in summer.

**Revenue per carbon footprint:** factor the distance travelled vs economic impact into Market Opportunity Mapping and market prioritisation **in 2026**. This mapping helps to ensure marketing funds prioritise winning visitor segments who are most likely to bring increased economic and community benefits through their spend and behaviours, as compared to the carbon footprint generated.

**Good citizen:** Tourism Ireland will continue our journey towards our own sustainability, measuring our own impact and building on improvements to be achieved through energy efficiency and ecologically responsible improvements.

**In 2026**, we will complete our baseline emissions impact and launch an ongoing improvement plan.





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## Enabling Business Objective 6: World class team, innovating for impact and living our values

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Our plans and strategies can only be delivered through the passion, dedication and skill of our team members. Tourism Ireland is staffed by 168 full time equivalent colleagues across 16 offices and 14 markets.

At Tourism Ireland, we are proud to be certified as a 'Great Place to Work'. Our values are Respect, Ownership, Creativity and Collaboration, ladder up to driving collective impact for tourism.

### Culture



**Support our culture of innovation & learning:** provide teams with the ability to pitch 'big idea' business cases, with test and learn frameworks for day-to-day innovation in every area.

**In 2026,** we will provide an innovation fund for those ideas with strong business rationales to step change tourism marketing.



**Coaching culture:** our teams are ambitious, and hungry to learn and evolve in their roles.

**In 2026,** we will roll out 'Thrive Together' feedback and coaching programmes organisation wide, to facilitate support for on-the-job learning, growth and development in a psychologically safe and inclusive environment.



**Collaboration:** is a core value, vital to our successful operation across 16 offices and 14 markets.

**In 2026,** we will strengthen centres of excellence, with cross functional working groups on key topics that can be led by either market or central teams dependent on topic.

### Capability and Capacity



**Resourcing:**

**In 2026,** we will conduct an Organisational Capacity Review to ensure, 20+ years after our foundation, that our structure, skills and footprint are set up for optimal impact for tourism in today's context, with future proofing in mind.



**Efficiency and Integrity:** when systems are integrated, and supportive of working smarter, time is saved for the team to focus their efforts where they can have most impact.

**In 2026,** we will initiate a review of our systems and technologies with integration, automation and efficiency in mind, whilst maintaining the highest levels of accountability (no priority 1 audit points).

## 06 Measurable Performance Targets

Tourism Ireland is proud to support Ireland's Tourism Policy Statement 'A New Era for Irish Tourism' and Northern Ireland's Tourism Vision and Action Plan in a unified plan for tourism marketing, supporting employment, regional spread, sustainability, competitiveness and innovation as we build tourism for the benefit of all.

### Business objectives, activities and measures

Business Objective	2026 Business Plan Activity	2026 Business Plan Indicator
<b>Grow Strategic Source Markets</b>	Achieve growth <b>across market regions</b> , deepening & defending in US, diversifying in Mainland Europe & Canada, growing Great Britain from strong foundations and unlocking nascent markets through partnerships.  Increase activation to achieve market diversification.	<b>~6%</b> revenue year on year average from overseas <b>island wide</b> to achieve €10.25B / £8.9B by 2031.  <b>Each overseas Market Area to contribute growth in 2026</b> , through increased activation in line with market diversification.
<b>Compete to win value adding visitors</b>	<b>Advertising</b> drives destination awareness with effective reach and frequency to drive consideration	Advertising drives <b>&gt;1.2B quality 'Opportunities to See'</b> , with effective reach and frequency to drive consideration among elevated audiences.  <i>Note: in line with strategy, investments will need to target harder to reach audiences in appropriate channels.</i>
	<b>Publicity</b> in top tier publications, broadcast and streaming channels. Broad scale earned media across markets.	Publicity in top tier publications, with journalists, content creators, across broadcast and streaming channels drives <b>1.6B opportunities to see including 550M relating to Northern Ireland</b> .  <i>Note: reflecting the strategy, there will be an increased focus on harder to reach markets and media; elevating the audience.</i>



	<b>Elevate Tourism Brand Ireland</b> – new brand campaign is launched, driving desirability of the island of Ireland as a destination.	<b>Elevate Tourism Brand Ireland</b> – new brand creative in top quartile for <b>Persuasion Score</b> .  Launch consumer marketing activities in line with an island of Ireland Approach to the new Culinary Tourism Strategy.
	<b>Research</b> - visitors discover things to see and do across the island of Ireland, including hidden gems across regions, compelling travel.  Website materials are <b>optimised for GenAI</b> .	<b>12M engaged sessions on Ireland.com</b> , as visitors discover things to see and do.
	<b>Advocacy</b> – daily posting on social channels across languages and markets engages fans and spreads social word of mouth.	Achieve <b>&gt;500,000 social engagements per month</b> and maintain 7.5M+ followers across social channels.
<b>Year-round, grow tourism across gateway cities, regions and NI</b>	<b>Refresh overseas positioning</b> of gateway cities, Experience Brands / regions to drive growth and dispersal.  Drive off peak growth with <b>Home of Halloween, St Patrick's Day, Winter Breaks</b> .	<b>+6.5% revenue year on year average</b> from overseas to <b>Northern Ireland</b> .  Refresh overseas positioning of <b>gateway cities, Experience Brands / regions</b> with 'icons' that drive growth and dispersal.  Drive off peak growth with <b>Home of Halloween, St Patrick's Day, Winter Breaks</b> . +6.5% year on year average revenue growth for regions and off peak.
<b>Strengthen go-to market with partnerships of the future</b>	<b>Connect this island</b> to the world with air and sea partners, focusing on inspiring demand for <b>strategic new routes</b> with tourism potential.	Connect this island to key strategic markets with air and sea partners. <b>15:1 ROI through co-operative marketing</b> with access partners driving visitor uplift.
	<b>Create global spotlight for tourism SMEs</b> through partner events, publicity, social, digital and advertising.	<b>Create global spotlight for tourism SMEs</b> with B2B / B2C promotion for <b>&gt;1000</b> industry partners, <b>333</b> selling NI.
	<b>Support commercial partnership</b> between local industry and overseas trade who can bring visitors at scale in <b>leisure and MICE (business events) sectors</b> .  <b>Undertake Intermediaries Appraisal</b> .	Enable <b>35K commercial meetings</b> between local industry and overseas trade; <b>7.5K focused on business events</b> . Meetings to deliver €300M business pipeline.  Complete Intermediaries Appraisal by end of year.

	Win visitors through <b>sporting events</b> , including American Football opportunities and golf marketing to leverage upcoming Ryder Cup.	Win visitors through sporting events, with golf marketing ahead to leverage Irish Open and upcoming Ryder Cup and leverage of American Football opportunities.
<b>Sustainable tourism respecting communities and place</b>	<p>Develop <b>Ireland Unrushed</b> driving 'slow tourism' itineraries, and active <b>summer coolcation trends</b>.</p> <p>Factor '<b>revenue per carbon footprint</b>' into market opportunity mapping.</p> <p>Deliver '<b>good citizen</b>' plan for TI footprint.</p>	<p>Develop <b>Ireland Unrushed</b> driving 'slow tourism' with at least 3 new creatives showcasing slow tourism itineraries.</p> <p>Factor '<b>revenue per carbon footprint</b>' into market opportunity mapping.</p> <p>Deliver '<b>good citizen</b>' plan for Tourism Ireland's footprint.</p>
<b>World class team innovating for impact and living our values</b>	<p><b>Budget rigour &amp; efficiency.</b></p> <p>'<b>Thrive Together</b>' coaching roll out, innovation fund and '<b>efficient systems</b>' review.</p> <p><b>Organisational capacity review</b> provides roadmap to support staffing, structures and upskilling.</p>	<p>Expenditure for the year not to have an <b>unplanned variance of more than +/-1%</b> of the total BP expenditure for the year, <b>no priority 1 audit points</b>.</p> <p><b>Achieve Great Place to Work accreditation</b> with constant improvement achieved by actioning feedback for example, 'Thrive Together' coaching roll-out, innovation fund and 'efficient systems' review.</p> <p><b>Organisational capacity review</b> provides roadmap to support staffing, structures and upskilling.</p>





## *07 Monitoring and Evaluating Implementation*

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Progress against the plan is monitored as follows:

- Each Tourism Ireland team 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 (Business Plan Indicator) has an internal owner who assesses progress of each measure each quarter.
- A monthly summary and quarterly detailed reporting of BPIs are produced and shared with the Senior Management Team, Tourism Ireland Board, and sponsor departments for discussion.
- The outcome of each BPI is reported on within the following Business Plan document.



## 08 *Communicating the plan*

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Staff, trade and industry contributed to the planning process, alongside our regular work on planning with departmental colleagues.

The full plan will be shared with staff, following on from earlier reviews of drafts.

Tourism Ireland's Marketing Plans Launches at Dublin and Belfast events in January will bring plans to industry stakeholders.





## Appendix A

### 2025 Business Plan – update on Business Plan key performance indicators

Tourism Ireland has made strong progress towards achieving the goals outlined in the 2025 Business Plan.

Status Key:

- Red/Amber – Achieved levels are under target or awaiting further data
- Green – Completed
- Grey – Awaiting Results
- Black – Cancelled

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

BPI	Commentary	Status
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.	<p>At the time of writing, island of Ireland results are not available from CSO/NISRA. However, the CSO have released data for Ireland (Ireland Direct only and excluding fares) for January – October 2025: revenue was €4.7 billion (no change on 2023, -13% vs same period of 2024). 2025 was impacted by the Dublin airport cap in Q1 and changing consumer confidence globally. NISRA have released data for Northern Ireland up to June 2025. Visitor revenue increased by +1% in the first half of the year (there was a +4% increase in visitor numbers during this period).</p> <p>Growth targets allow for higher years (2024 at +9% revenue y/y) and lower years (2025), with the aim that the long-term trend is one of growth.</p>	
BPI 2 - Increase overseas tourism revenue across Northern Ireland by +6.5% growth per year on average over the period 2024 to 2030.	At the time of writing, NISRA data for Northern Ireland is only available for Q1 and Q2 2025. Data shows a visitor revenue increase by +1% in the first half of the year with a corresponding +4% increase in visitor numbers.	



## Supporting economies and communities

BPI	Commentary	Status
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.	At the time of writing, island of Ireland regional or seasonal data is not available from CSO/NISRA and Fáilte Ireland sources for 2025.	

## Sustaining the environment

BPI	Commentary	Status
BPI 4: Run a slow-tourism month ('Ireland Unrushed' campaign) focused on car-free travel itineraries to encourage sustainable exploration of the regions of Northern Ireland and Ireland.	Tourism Ireland's new global campaign – Ireland Unrushed – was launched across 13 markets for the month of June 2025, showcasing new ways for overseas holidaymakers to explore the island of Ireland, the campaign encourages people to visit the island of Ireland and to take time to enjoy our scenery, culture and heritage more deeply. We focused on social and economic sustainability by increasing the spread of visitors around our regions, while also spotlighting sustainable tourism businesses. The campaign achieved a persuasion score of over 90% and 121 million Quality Opportunities To See.	
BPI 5: Establish externally validated measurement of Tourism Ireland's environmental footprint.	The project is underway with results expected early 2026.	

### Inspiring visitors: Awareness

BPI	Commentary	Status
BPI 6: 1b high quality audio visual 'Opportunities To See' across all consumer marketing (excluding static display ads) in 2025.	It is estimated there will be 1.9B Opportunities to See generated by Tourism Ireland's work in 2025. Achieved via a combination of added value on linear TV, efficiency in CPMs and strategic optimisations around audience targeting and reallocation of budget to better performing channels/placements.	
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>It is estimated there will be 1.8B publicity opportunities to see generated by Tourism Ireland's work in 2025. Ireland Week, St Patrick's Day, Ireland Unrushed and a busy media visits period in Sept/Oct in addition to the Programming Fund and Content Push all contributed to stand out Tier 1 performance.</p> <p>It is estimated there will be 650M publicity opportunities to see Northern Ireland content in 2025. Driven in part through increased broadcast TV activations, and Tourism Ireland's overseas activations around the Open.</p>	

### Inspiring visitors: Consideration

BPI	Commentary	Status
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	New brand creative was independently tested, with campaigns meeting threshold and insights informing final optimisation ahead of launch.	

### Inspiring visitors: Research

BPI	Commentary	Status
BPI 9: 10m people will research the island of Ireland on Ireland.com during 2025. Measured by Research Visits (Engaged Sessions)	At the time of writing, we expect to achieve 11M research visits on Ireland.com by the end of 2025. This has been driven by ongoing optimisation in paid search alongside the Fill Your Heart with Ireland campaign and St Patrick's Day and Ireland Unrushed campaigns.	

### Inspiring visitors: Advocacy

BPI	Commentary	Status
BPI 10: 7.5m followers on social channels by the end of 2025.	We expect to maintain 7.5M global followers across Tourism Ireland's active consumer social media accounts. The progress towards the goal is down to ongoing global organic social media content creation and optimisation, alongside paid fan acquisition activity across both Meta and TikTok channels.	
BPI 11: 70% of content created for social contains regional or seasonal message across scheduled feed posts.	On track to achieve 75% seasonal and regional content promoting travel outside of the main summer peak season or to destinations outside of Dublin/Belfast performing well on Instagram and Facebook.	

### Strengthening partnerships

BPI	Commentary	Status
BPI 12: Support 30k meetings between industry and trade overseas, to include 7.5k business events meetings, and 6k golf and luxury meetings.	Tourism Ireland will deliver over 30,000 meetings between industry and trade. Business Events and Golf & Luxury targets will be met following attendance at strong event platforms including IMEX America, IBTM and ILTM.	
BPI 13: Access campaigns promoted through co-operative marketing to achieve 10:1 ROI on Tourism Ireland's investment.	Co-operative access campaigns on average are performing significantly above the target 10:1 return on investment. Campaign results to September indicate that ROI is averaging 35:1.	
BPI 14: Industry engagement to offer promotional opportunities to 750 island of Ireland businesses, including 250 businesses selling Northern Ireland.	Target was exceeded due to strong island of Ireland and Northern Ireland industry engagement. We expect to have offered promotional activities to over 900 business across the island of Ireland including 300 selling Northern Ireland.	

### World class team demonstrating integrity

BPI	Commentary	Status
BPI 15: Budget rigour and efficiency: the 2025 audit reports will have no priority 1 financial control audit findings, expenditure +/- 1% variance.	No priority 1 items in any of the internal audits concluded in 2025 to date. The expenditure variance will be finalised after year end; all indicators are that we will achieve this target.	



## Living our values and growing expertise

BPI	Commentary	Status
BPI 16: Uplift our 2024 employee satisfaction score by 5% and retaining our Great Place to Work accreditation.	We have successfully maintained our Great Place to Work accreditation, reaffirming our commitment to fostering a positive and inclusive workplace. However, our employee satisfaction scores did not increase (-2 points).	
BPI 17: Initiate organisational capacity review to set up for success in our staffing, structures and upskilling.	Strong progress being made in advancing the OCR. The review is on track with the expectation of completion in H1 2026, ensuring that outcomes will be ready to inform future planning and capability building	

## Appendix B: Economic

Tourism Ireland	Approved Budget 2025			Proposed Change +/-			Proposed Budget 2026		
€1 = 0.86 GBP 2025 €1 = 0.84 GBP 2026	Resource	Capital	Total	Resource	Capital	Total	Resource	Capital	Total
Existing Level Programme	50,147	7,040	57,187	1,110	7,500	8,610	51,257	14,540	65,797
Total Programme Expenditure	50,147	7,040	57,187	1,110	7,500	8,610	51,257	14,540	65,797
Pay Costs	18,100	0	18,100	1,816	0	1,816	19,916	0	19,916
Non Pay Administration Costs	11,300	990	12,290	1,163	70	1,233	12,463	1,060	13,523
Total Administration Costs (excl Pensions)	29,400	990	30,390	2,979	70	3,049	32,379	1,060	33,439
Total Prog & Admin Expenditure, excl Pension Costs	79,547	8,030	87,577	4,089	7,570	11,659	83,636	15,600	99,236
NI share representing 23%	21,603	0	21,603	1,419	0	1,419	23,022	0	23,022
IRL share representing 77%	57,944	8,030	65,974	2,670	7,570	10,240	60,614	15,600	76,214
Pension costs – NI representing 25%	275	0	275	100	0	100	375	0	375
Pension costs – IRL representing 75%	1,100	0	1,100	0	0	0	1,100	0	1,100
Overall Total Expenditure for approval	80,922	8,030	88,952	4,189	7,570	11,759	85,111	15,600	100,711
Total NI share, including pension costs	21,878	0	21,878	1,519	0	1,519	23,397	0	23,397
Total IRL share, including pension costs	59,044	8,030	67,074	2,670	7,570	10,240	61,714	15,600	77,314
Existing/Projected Staff Numbers (FTE)	168						168		
Assumptions/Notes									
1. The increase in pay and operating costs from 2025 to 2026 consists of a number of items which include, inflation, salary increments payable, additional temporary staff costs provided for in DETE funding pending the outcome of the OCR, known additional costs such as the OCR review, systems upgrades, recruitment costs & costs associated with the extra staff etc.									
2. DfE funding in 2026 is as 2025, plus an allowance for inflation, the change in exchange rates between the Euro & Sterling and for changes in pension costs.									

**Breakdown of Pension/benefit costs included in Business Plan €000's**

	<b>NI</b>	<b>IRL</b>
Pension/benefit costs for N/S Body service	375	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>375</b>	<b>1,100</b>



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## Appendix C

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Images used within this document.

Location	County
Ballintoy Church	Antrim
Belfast Commercial Court	Antrim
Carrick-a-Rede	Antrim
Whitepark Bay	Antrim
Cliffs of Moher	Clare
Inis Cealtra, Lough Derg	Clare
Fastnet Lighthouse	Cork
Garretstown Beach	Cork
Kinsale Harbour	Cork
Banks of the Foyle Halloween	Derry-Londonderry
Peace Bridge	Derry-Londonderry
Grianán of Aileach	Donegal
Mount Stewart	Down
Mourne Mountains	Down
Custom House	Dublin
Trinity Long Room	Dublin
Lough Erne	Fermanagh
Seal	Kerry
Skellig Islands	Kerry
St Brigid Mural	Kildare
Glencar Lake	Leitrim
Adare Manor	Limerick
Great Western Greenway	Mayo
IHH Boating	Roscommon/Leitrim
Ballinderry Village	Tipperary
Lough Derg	Tipperary
Rock of Cashel	Tipperary
The vee drive	Tipperary
Glasson Lakehouse	Westmeath
Glendalough	Wicklow

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## Appendix D - Glossary

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Intermediaries Appraisal	<p>During 2026 Tourism Ireland will complete an appraisal of our intermediary eco-system in which we thoroughly evaluate the various sales and promotional channels available to Tourism Ireland and our island of Ireland tourism industry partners overseas. The appraisal will assess a wide range of existing and potential channels including but not limited to traditional travel trade in market, tour operators, online travel agencies and travel advisors/travel agents. The appraisal will seek to identify the most effective promotion opportunities for the island of Ireland and how Tourism Ireland can best utilise these channels for promotional purposes and to support industry in future.</p>
Nascent markets	<p>Emerging markets that are expected to provide future opportunities for the island of Ireland such as India and China.</p> <p>Tourism Ireland maintains a presence in these markets and works on a partnership basis to support opportunities identified by industry partners where the economic benefit to the island of Ireland outweighs the environmental impact of travel from these markets.</p> <p>Tourism Ireland also promotes the island of Ireland, as appropriate, at major global events wherever they are in the world, and works in support of Ireland and/or Northern Ireland government objectives.</p>
Strategic Air Access Fund	<p>A specific fund identified in the Irish Government's Action plan on market diversification to be used to maximise the opportunities presented by strategically important new routes with inbound tourism potential to the island of Ireland. This includes routes from Nascent markets.</p>
Regional targets	<p>Tourism Ireland undertakes a wide body of regional promotion supporting tourism demand right across the island of Ireland. Much of the activity is related to Experience Brands such as Wild Atlantic Way, Ireland's Hidden Heartlands, Ireland's Ancient East and Northern Ireland Embrace a Giant Spirit. Regional targets are based on island of Ireland tourism revenue outside of Dublin due to availability of timely data.</p>
Business pipeline targets	<p>Industry attendees at overseas events supported by Tourism Ireland are asked to estimate the 1-3 year pipeline achieved through participation. This is modelled to create a prospective pipeline figure from Tourism Ireland's overseas events.</p>

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### ***Appendix E - Footnotes***

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- 1 Tourism Ireland's analysis of CSO/NISRA data.
- 2 Media agency tracking.
- 3 KANTAR LinkExpress research.
- 4 REDC / Tourism Ireland Sentiment Tracker.
- 5 Tourism Ireland internal reporting.
- 6 OAG data analysed by Tourism Ireland.
- 7 KANTAR Concept Testing research.
- 8 REDC Global Travel Survey



