



Corporate Plan 2026-2028

Competing to Win



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01 Executive Summary and Tourism Context

Tourism is a primary indigenous export industry generating economic value across the island of Ireland. Tourism across this island supports:



€6.9B / £6B of incoming visitor spend in 2024.



70% of tourism jobs are outside of Dublin or Belfast, supporting rural employment and entrepreneurialism.



Soft influence of 8.4M (in 2024) overseas visitors experiencing the island per year, with >50% proactively recommending to others.



Cross border collaboration on the tourism brand of this island destination.



300k jobs, 6/10 of which depend on overseas tourism specifically.

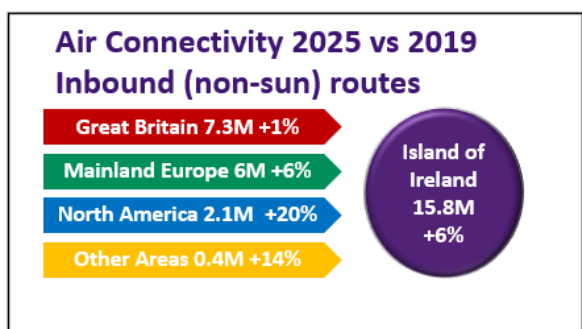


Air and sea connections with benefits beyond the industry itself for business on this island.

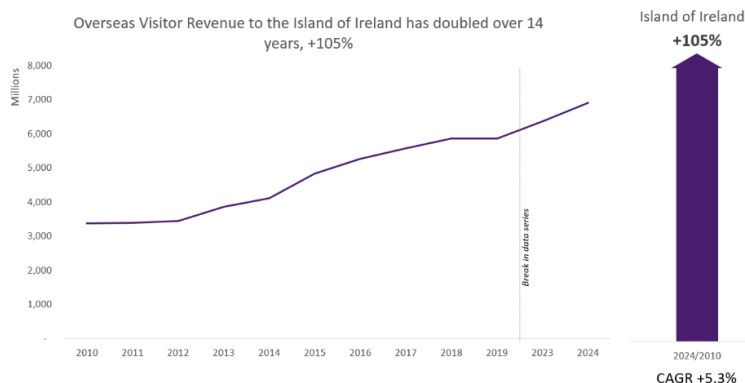


2024 was a record year for overseas tourism revenue to the island of Ireland. Since 2010, overseas tourism to the island has doubled from €3.4B / £2.9B to €6.9B / £6B, representing +18% increase compared to 2019¹. Visitor spend since 2010 in Northern Ireland also doubled from £319M to £633M. Now a quarter of all visitors to the island spend a portion of their trip in Northern Ireland, creating opportunities to lengthen stays and further increase economic benefits.

As an island, air and sea connectivity is vital for tourism, and indeed tourism can create demand for key routes the establishment of which then benefits other sections of the economy, helping local businesses and generating foreign direct investment. Connectivity has seen broad growth and strong recovery since 2019. Seats on flights connecting the island of Ireland in summer months have increased to 15.8M in summer 2025, +6% vs 2019², based on inbound (non-sun focused) routes. As the fastest growing region, +20% seat capacity from North America has been achieved, connecting this island to this high value, high headroom source market, whose visitors each spend 1.7X more than those from Mainland Europe, and 3.4X more than those from Great Britain².



Supporting connectivity remains essential to island-wide success, and to market diversification over coming years, reducing over-dependence on any single market.



Tourism Ireland plays a key role in partnering with air and sea carriers to stimulate demand.

Looking ahead, tourism offers unique continued benefits to the island’s economies. Growing visitor spend by ~6% on average each year to 2031 would accelerate economic value generation from €6.9B / £6B in 2024 to €10.25B / £8.9B by 2031^{1/3}. Targeting average increases allows for years of overperformance (as in 2024) or slower performance (as in the early months of 2025), navigating always towards strong impact, as in the trajectory achieved from 2010-24.

Growing Northern Ireland spend by +6.5% on average each year, would double inbound visitor spend to £1.3B by 2035⁴. Since Tourism Ireland’s foundation, interest in visiting Northern Ireland has grown ~10X to >60%⁵ of target overseas audiences expressing interest in visiting at some point, with ‘beautiful landscapes and scenery’ now the primary unprompted association overseas audiences link with Northern Ireland overtaking memories of the Troubles⁵. There is opportunity ahead, building key priorities from the Tourism Vision and Action Plan into actions to drive responsible growth for the coming years.

Focused strategies, smart marketing and continued investment will enable Tourism Ireland to support this island's vital tourism industry. Our work will provide benefits island wide, across regions and jurisdictions, taking account of Ireland's Tourism Policy Statement as it launches, and leveraging Northern Ireland's Tourism Vision and Action Plan.

Changing circumstances necessitate agility, with focus on visitor needs, competitiveness and sustainable benefits for businesses and communities. The island is not a low-cost destination to visit. When overseas audiences consider a trip today, 51% anticipate Ireland will represent good value, 45% anticipate Northern Ireland will represent good value, putting the island in line with other Northern European destinations but behind, for example, Italy at 64%. We are working in a very competitive environment – in our recent Sentiment Tracker, holidaymakers identified over 70 destinations they were thinking about travelling to⁵.

Competitiveness measures are welcomed, and using marketing levers, Tourism Ireland plays a vital role in targeting potential visitors with funds to travel, elevating perceptions of what the island of Ireland today offers, ultimately winning visitors over competitors.

Sustainability is both a responsibility and an opportunity. Growing revenue while being socially beneficial and limiting environmental impacts requires that we focus on visitors who will bring maximum value to the island in terms of spend and behaviours, relative to carbon generated.



With 50% of consumers stating they would spend more on sustainable accommodation and experiences, the island of Ireland has an opportunity to win visitors with responsible tourism offerings and messaging⁶.

Accounting for capacity, changes in the accommodation sector influence seasons in which there is headroom for growth. Short-term letting regulation in Ireland may, for broader societal reasons, change what accommodation will be available to tourism. The hotel sector reaches 88% average occupancy in summer months, compared to 72% from October to May⁷. Year-round tourism investment to give visitors reasons to travel, fill capacity and support jobs year-round, will be important.

Building to €10.25B / £8.9B by 2031, key themes for 2026-28 will be connectivity, capacity, competitiveness, year-round and island wide sustainable growth, achieved through partnerships and consumer outreach. Ultimately, we must elevate our connections and appeal across a range of markets to show business and leisure visitors why investing in visiting is more than 'worth it'.

Tourism Ireland is proud to support respective governmental and departmental goals, in a unified plan for tourism marketing, supporting employment, regional spread, sustainability, competitiveness and innovation as we build tourism for the benefit of all for the future.

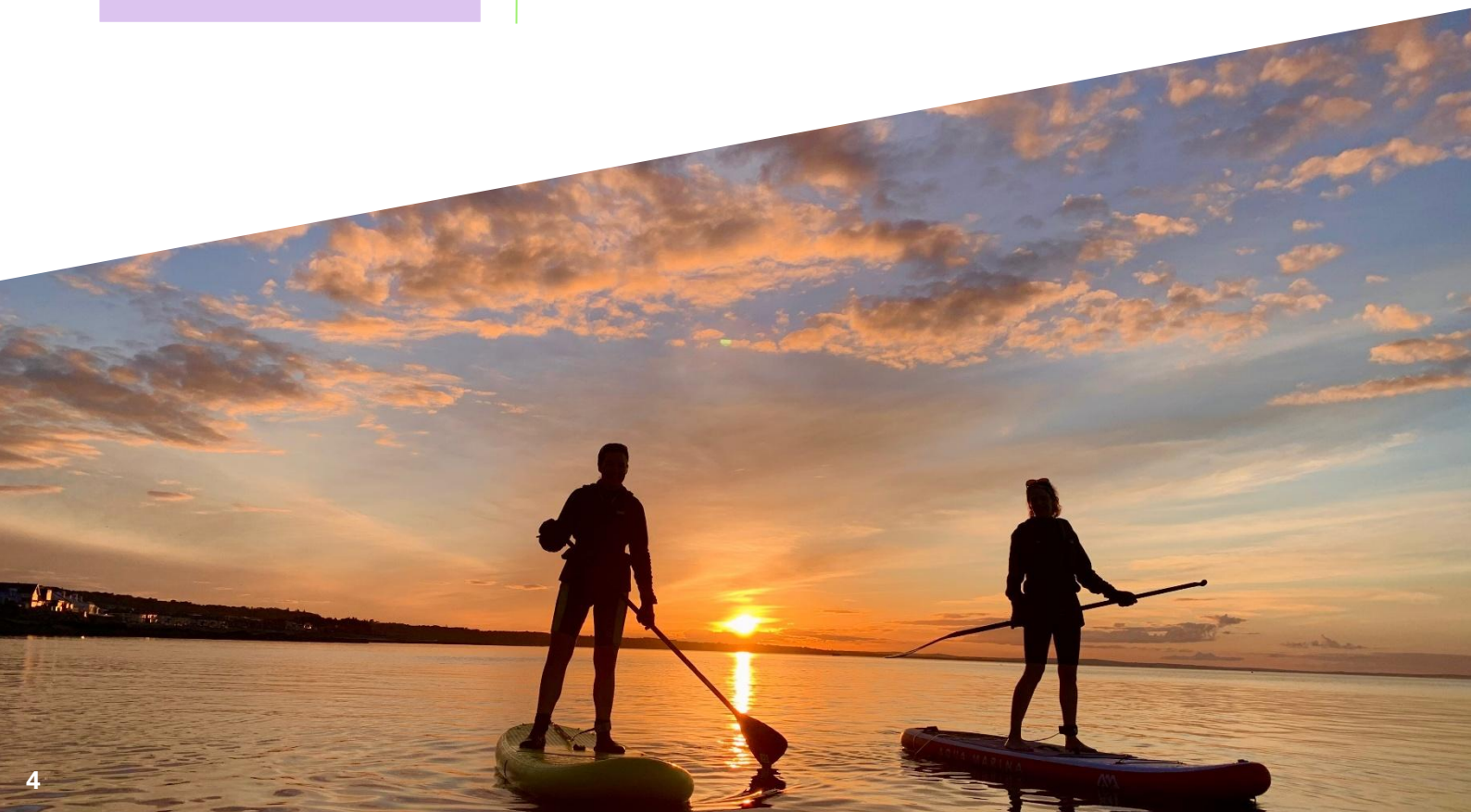
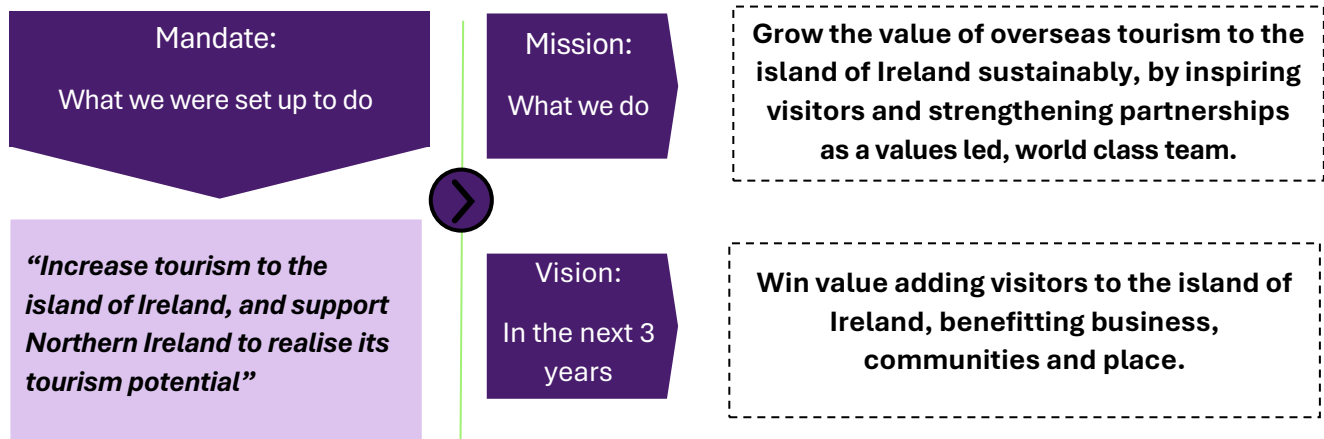
02 Our Mandate, Mission and Vision

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 2024²).

Our mission, or what we do day by day, is to ‘grow the value of overseas tourism to the island of Ireland sustainably, by inspiring visitors and strengthening partnerships as a values led, world class team’.

In the coming three years, competing effectively at today’s price point will be vital, in order to bring value (visitor spend) to businesses, and communities. This island is famed for its greenery and landscapes and we must respect our environment and sense of place through responsible tourism, avoiding over-tourism sentiment or damage to valued environments.

Put simply, our compelling vision for 2026-28 is to ‘win value adding visitors to the island of Ireland, benefitting business, communities and place’.



03 *Review of performance against the 2023-25 Corporate Plan*

At the outset of the Corporate Plan 2023-25, Tourism Ireland sought to support industry in recovery post-Covid. The three years covered by the previous plan brought changing circumstances, which Tourism Ireland was proud to respond to with agility to stimulate visitor trips and spend from overseas, supporting businesses and communities on the ground across the island. By the end of 2024, we welcomed 8.4M overseas visitors, spending €6.9B / £6B, staying 7 nights on average. We generated tourism growth from diverse markets, with US, Canada, Nordics, Netherlands, France and Switzerland all outperforming the +9% average visitor spend growth in 2024. In Northern Ireland, the share of revenue sourced from overseas (relative to domestic or visitors from Ireland) increased to 58% by 2024, particularly driven by strong North American performance at +23% visitor spend¹.

In the lifespan of the plan, inflation and trade uncertainties were combined with local conditions such as capacity constraints in accommodation and connectivity (for the period the Dublin Airport cap was applied). For Northern Ireland, the ETA made it all the more important to show visitors why a trip would be 'unmissable'⁸. Cost was on the mind of consumers and businesses, with competitiveness a key focus. In addition, changes in the collection of official visitor volume and value statistics have resulted in several of the original Corporate Plan goals needing to be updated as the plan progressed.

Year to date 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 as stable when compared with 2023, with opportunity ahead.

Tourism Ireland's 2023-25 Corporate Plan was developed with sustainability at its heart. The central focus was on returning economic sustainability to the industry following the Covid pandemic while at the same time increasing social and environmental sustainability across our work and impact.

The focus on sustainable recovery and rebuilding of the tourism industry was central to our activity.

A full assessment of the 2023-2025 Corporate Plan targets and the outcomes achieved is included in Appendix A.

- International visitors to the island of Ireland spent **€6.9B / £6B in 2024, an increase of €1B / £870M or +18% compared to 2019¹**.
- Tourism Ireland worked collaboratively with air and sea carriers to inspire demand for new and increased strategic routes to the island, reaching **+6% air seats** on non-sun routes serving the island vs 2019².

- Supporting local industry, Tourism Ireland facilitated **>750 tourism SMEs per year** by 2025 to build connections overseas, through trade partnerships and industry events leading to **30,000 meetings per year**⁹. Positive return on investment and co-funding by local businesses demonstrated the value generated.
- **Value Adding Tourism Traits (VATTs)** were developed and fully deployed in decision making across the Corporate Plan period. The Value Adding Tourism Traits framework focuses on encouraging year-round visitors who spend more, stay longer, travel around the whole island and consider their environmental impact¹⁰.
- Tourism Ireland innovated with **‘revenue per carbon footprint’** as a measure by which to prioritise those segments and markets bringing more economic benefit weighed against the environmental impact of travel. On the ground, we promoted ‘slow tourism’.
- A new **consumer campaign** was developed featuring loved local figures the Derry Girls and Sharon Horgan to use humour and warmth in order to demonstrate how visitors ‘fill their hearts’ on a trip to the island of Ireland. The highly successful campaign ran throughout the Corporate Plan period focusing on the Value Adding Tourism Traits – encouraging regional, seasonal and responsible travel options. Ireland is now rated a **top 10 destination** overseas target consumers would like to visit⁵.
- A new **overseas visitor segmentation** was developed with a focus on identifying the highest value target audience across the world. **Enrichment Explorers** were chosen due to their behavioural fit for the product the island of Ireland offers (e.g. not solely seeking sun holidays, they have funds to travel and are interested in authentic experiences).
- The new segmentation is now fully integrated into our activity, campaigns and targeting, contributing to strong, measured return on investment.
- **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 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 **Northern Ireland** (overtaking ‘the Troubles’ as the primary association overseas audiences have).
- Growing visitation to the **regions of Ireland** was also a key element of the plan, encouraging high quality employment opportunities across the whole island.
 - The **Wild Atlantic Way** is now 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.

- Visitor spend across the island **outside of Dublin** increased by +11% in 2024 vs 2023, outpacing overall spend growth of 9% island wide¹¹.
- Encouraging people to travel outside the cities has further been enhanced by our **‘Ireland Unrushed’** campaign which aired in 2025. This campaign reached >100M people¹², with strong ‘persuasion scores’ at >90%¹³ indicating ability to change mindsets. 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 more¹⁴.
- **Extending the season** to support more stable employment in the sector was encouraged by the promotion of seasonal experiences. This included the award-winning **Home of Halloween** campaign rolled out across 14 markets by Tourism Ireland. The campaign builds on Halloween’s origins on the island of Ireland and demonstrates a compelling reason to visit out of peak. It created 2X the recognition of Halloween’s Celtic origins on this island with 7/10 more likely to want to visit¹³. **St Patrick’s Day** iconic Greenings were re-imagined and re-introduced, and press coverage and advertising around the world led this to be the time of year when searches for ‘Ireland’ online reach their highest peak, teeing up travel bookings for the year to come⁹.
- The Corporate Plan identified the need for two significant strategy projects.
 - The **Mainland Europe Appraisal** identified significant opportunity for growth, capitalising on evolving travel behaviours. A visitor-led approach across Mainland Europe will see an elevation of Tourism Brand Ireland in these markets with increased year-round activity promoting off-season breaks, city gateways as well as more traditional longer holidays from Germany and France. A ‘plus one’ strategy will encourage visitors to experience one more region, one more activity – spreading the economic impact across the whole island.
 - The **Emerging Markets Assessment** also considered the unexploited potential from existing markets, and utilised Value Adding Tourism Traits to conclude that investment can be targeted where the economic value outweighs the travel distance. The establishment of a **Global Opportunities Team** powered Tourism Ireland’s partnership outreach across nascent markets.



- Tourism Ireland leveraged **'screen tourism'** moments to build fame for the island, with behind the scenes interviews with global stars promoting the island as the location for hit productions such as 'How to Train Your Dragon', 'Wednesday', 'Bodkin' and more, in collaboration with Northern Ireland Screen and Screen Ireland.
- Through the **programming fund**, Tourism Ireland innovated radically to co-produce TV and streaming productions through cooperative funding for shows that would immerse audiences in long form content promoting the island.

Producers focused on themes beneficial to tourism, with distribution opportunities overseas, delivering 1.2B reach since 2023, with almost 900M 'Opportunities To See' in US, 211M in GB, 39M in Germany and 11M in France, and broadcast placements in all markets. Examples of hit shows have included 'Ireland with Michael' in the US, now running into a sixth series based on popularity, 'Dermot's Taste of Ireland' featuring Dermot O'Leary in Great Britain, or 'The Emerald Isles' focused on tourism to offshore islands with Ardal O'Hanlon across markets.



Tourism Ireland's consumer marketing activity resulted in an estimated return to the economy across the island of Ireland of **25:1**, or 25 Euro / Pounds generated in visitor spend for every 1 Euro / Pound spent on overseas marketing¹⁵.



04 Strategic Objectives and Goals

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

This 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 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.

€6.9B

Inbound Visitor Spend Island-Wide 2024

~6% per annum

€10.25B/
£8.9B

Inbound Visitor Spend Island-Wide 2031



Overseas reputation	Travel consideration – island of Ireland is a Top 10 destination considered by consumers in Tourism Ireland target markets (Tourism Ireland research).	Competitiveness/Macro Uncertainty – only 51% of consumers believe Ireland will be ‘good value’ (Tourism Ireland research) at a time when macro uncertainty is increasing price sensitivity.	‘Worth it’ – drive perception of value for money at today’s price point by elevating Tourism Brand Ireland through unique aspects of scenery, culture, history and food.
Accommodation infrastructure	Accommodation capacity – is increasing, +7% in Ireland, +4% in Northern Ireland in 2025 vs 23. There is 16% more bed space to fill from October to May vs summer months, based on occupancy trends (IHF, STR).	Self catering capacity – is likely to be limited in Ireland by upcoming regulation, impacting supply of the preferred type of accommodation of ~10% of overseas visitors (NISRA/Fáilte Ireland).	Grow utilisation year-round of registered and approved accommodation, in order to fill off-season space, pending development or change of use planning permission of further accommodation.
Air and sea infrastructure	Connectivity is increasing, with air seat capacity on routes typically used by inbound visitors +6% vs 2019 , +20% for NA (OAG).	Dublin airport cap certainty on the long-term capacity of Dublin airport alongside growth of regional and Northern Ireland direct routes. Investing in strategically important routes will be vital to winning inbound vs sun route focus.	Stimulate demand for strategic inbound air/sea routes to connect key source markets to the island.
Northern Ireland	Ease of travel on the island is supported by new and greater frequency public transport e.g. hourly Dublin to Belfast trains and coaches, while interest in visiting Northern Ireland has grown ~10X since 2002 (NISRA).	ETA – adds an extra step for consumers from outside GB/Ireland who want to travel to Northern Ireland.	Increase desirability and demand for direct routes for Northern Ireland (in addition to broader government dialogue on the ETA).
Market diversification	US spend grew by +17% from 2023 to 2024 alone, air access has never been stronger, with 21 gateways +20% seat capacity compared to 2019 (CSO/NISRA/OAG).	Concentration or overdependence - >50% of overseas visitor spend is sourced from just two markets, Great Britain and US (CSO/NISRA).	Diversify markets keeping foundations strong, while investing to drive growth across a portfolio of strategic source markets.
Regional Jobs	Support for tourism is strong with 9/10 saying tourism is good for their community in Ireland (Fáilte Ireland) and with 70% of tourism jobs outside Dublin / Belfast (CSO/NISRA/Fáilte Ireland).	Cost of doing business puts pressure on profitability / viability for tourism businesses.	Overseas demand generation for tourism SMEs across the island, to generate revenue for businesses (in addition to broader government competitiveness measures).
Sustainability	Visitors place a premium on sustainability with 50% willing to pay more for sustainable accommodation and experiences while on holiday and with 35% avoiding extreme heat in summer (Tourism Ireland research).	Climate Change poses a risk to life on this planet, and all sectors must improve environmental practices, tourism included.	Prioritise higher revenue per carbon footprint segments, to maximise economic and social sustainability while limiting environmental impact. Maintain positive community support and grow visitor perceptions.

Accounting for opportunities and risks, and pursuing ambition for the years ahead 2026-28, Tourism Ireland will achieve success through the following strategic business objectives, enablers and actions.



05 Business Objectives & Activities

Business Objective 1: Grow strategic source markets

Tourism Ireland will target a balanced growth portfolio, sourcing increased visitor spend from strategic market areas, with coverage dependent on investment.

Tourism Ireland will take a data-based approach to market coverage, based on Market Opportunity Mapping. Using signals like visitor volume, potential population, spend, access, income and connection to the island data to focus on the highest return prospects for the island of Ireland will ensure we optimise market coverage and diversification according to investment levels.

Deepen and defend US - Tourism Ireland has an active programme of marketing in the US, which includes advertising, publicity, social and digital activity to win visitors, as well as partnerships with airlines to stimulate demand for new and existing routes and partnerships with tour operators and travel trade to secure the programming of the island of Ireland on itineraries. The US contributes 29% of visitor spend to the island of Ireland, or €2.0B / £1.7B in 2024. US visitors spend 1.7X per trip what the average Mainland European visitor spends and up to 3.4X per trip what the average visitor from Great Britain spends¹. In terms of return on investment, it is the highest-performing market for the island, as well as being the highest inbound revenue market. Any risk to the US is a risk keenly felt by tourism businesses island wide.

Albeit there are currently changing circumstances for consumers and businesses in the US, aviation partners are expanding gateways from the US to Ireland, with new cities like Nashville, Indianapolis, Denver and Detroit

benefitting from direct services to Dublin over the past year and with planned seat capacity at 110% of 2024's level in summer 2025, and 120% the level existent pre-Covid². Air access is vital not only for tourism, but also for business relationships and foreign direct investment. To maximise the opportunities presented by new gateways and to keep these routes for the long-term, we must stimulate demand in changing circumstances, particularly focused on winning high-end consumers with funds to travel to fill airplanes and drive visitation. Marketing in newer gateway cities that do not have traditional diaspora links but are vital for future growth and wider Team Ireland and Team Northern Ireland objectives will include covering Minneapolis, Nashville, Dallas, Detroit, Atlanta, Indianapolis, Cleveland, Seattle and Denver (dependent on budget).

Later in the plan period a North American appraisal will be conducted to ensure our marketing activity fully adapts to the new gateway opportunities and evolving travel patterns across the US, as well as maximising the growing opportunities from Canada.

Diversify growth with Mainland Europe and Canada - Mainland European markets contribute 32% of total visitor spend to the island², with spend sourced from over 10+ markets with cultural and language nuances to account for. Tourism Ireland's recently completed Mainland European Appraisal outlines a strategy to achieve step change growth from these markets with additional investment. With investment, Tourism Ireland will run year-round campaigns with tailored communications in Mainland Europe, seeking to elevate perceptions of the island of Ireland to generate year-round business.

Additional year-round visitation is fundamental to building sustainable tourism businesses most especially for SMEs. With investment, there is potential to grow visitor spend from Mainland Europe, from a foundation of €2B / £1.7B per annum in 2024 to €2.75B / £2.4B by 2030.

As an additional diversification focus, Canada is 5th largest market in terms of visitor spend for the island of Ireland and was one of the fastest-growing inbound visitor spend² markets for the island in 2024. Upweighting our marketing activity in Canada to all access gateways would 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 currently contribute 26% of visitor spend on the island of Ireland (2024), amounting to €1.8B / £1.6B each year and the highest volume of visitors and nights². Visitors from Great Britain bring particular value to Northern Ireland, representing the largest visitor revenue market. To keep visitation strong from our closest neighbour, Tourism Ireland will maintain current investment levels. Our work will include consumer marketing campaigns, publicity and broadcast impact, with social and digital presence, air and ferry cooperative 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 (markets where Tourism Ireland doesn't directly operate at present). We will work with industry to target high value prospects where the expected revenue return outweighs the distance travelled to the island. Tourism Ireland's Global Partnerships team established as part of the implementation of the Emerging Markets Assessment in 2024 will support industry activity and overseas tour operators in nascent markets ensuring that the island of Ireland can compete and win. A strategic access fund will also be available as part of promoting new routes that support tourism and the wider economy.

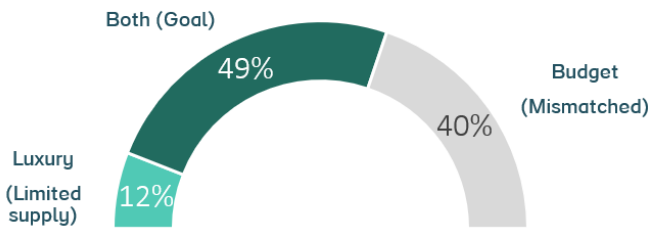


Business Objective 2: Compete to win value adding visitors

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 match today's price point, tackling outdated perceptions and increasing desirability. The goal is to compete effectively with the world's most aspirational destinations. Creating assets that achieve high persuasion scores with 'value adding visitor' segments can move the dial on the attractiveness of the island of Ireland when paired with consistent publicity, social and digital activations.

Perception of the island of Ireland overseas



Compel high value visits through iconic uniqueness: drive desirability through iconic aspects of the destination:



Icons of Landscape: position the 'Ireland of islands', continuing to maximise coastal landscapes, beaches, boat trips and those aspects of scenery that perform strongly as reasons to visit, knowing landscapes are the most prominent reason visitors indicate they choose the island⁵. Water based trips, whether around coasts or through the Hidden Heartlands and Lakelands provide a particular motivator for travel.



Icons of Culture: leverage screen tourism and behind the scenes content from movies and series shot on the island, giving visitors a chance to experience the places they have loved on screen, following on from success with 'Game of Thrones', 'Star Wars', or 'How to Train Your Dragon'. Maximise recognisable music and dance traditions, including promotion of TradFest in Dublin and Belfast UNESCO City of Music, in addition to festivals like the Fleadh Cheoil. Focus on Culinary Tourism activity island wide, tackling outdated perceptions of what Irish food offers and showcasing the freshness and diversity of food and drinks on the island as an important aspect of destination choice, particularly for Europeans.



Icons of History: Celebrate the richness of our heritage — from Brigid's Day and St. Patrick's Day to the 'Home of Halloween'. Highlight moments of resonance for overseas audiences that relate to historical moments or places, taking account of history and heritage as a significant motivator for travel. Appropriately promote peace tourism to relevant audiences for whom this history is compelling, in inclusive ways with partners and sister agencies on the ground. Connect 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. Lean into specific moments of relevance to diaspora.





Cut through in today's channels:

advertising, brand partnerships, publicity, programming co-productions, social, digital/AI 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 measurable return on investment in terms of visitor spend won relative to total spend invested.

During the course of this corporate plan, a renewed Return on Marketing Investment study will be instigated, targeting above marketing industry benchmarks for impact delivered, building on an estimated 25:1 impact in the prior corporate plan, per Kantar research (i.e. 25 Euros or Pounds coming into local economies from visitor spend for every 1 Euro or Pound spent on Tourism Ireland's overseas marketing)¹⁵.



Business Objective 3: Year round, grow tourism across gateway cities, regions and Northern Ireland

Year-round tourism: Data shows the average time between booking flights and travelling to the island from overseas is approximately 60 days, demonstrating that visibility throughout the year is important if we are to stimulate ongoing bookings. The benefit to driving year-round tourism is the support for year-round jobs and the potential to utilise ~16% more capacity in accommodation October to May (72% average occupancy) vs summer months (88% average occupancy)⁷, by effectively marketing seasons outside of the summer peak. Investing to support ‘always on’ marketing, Tourism Ireland will capture year-round opportunities with a calendar of reasons to visit, from Brigid’s Day to spring gardens, from summer outdoor activities, and long stays, to autumn and winter breaks and attractions. Year round marketing coverage is budget dependent. Tourism Ireland will take a data backed approach to apply investment to the highest potential marketable moments in the year. Notable calendar moments will include:



St Patrick’s Day: >100K visitors enjoy St Patrick’s Day festivals, with a spread of authentic festivities across the island¹⁶. Tourism Ireland markets festivals not only to win visitors who will travel in March, but also to create a spotlight in publicity around the world through iconic greenings, news partnerships and promotional materials, driving 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: the origins of Halloween in Celtic culture 2000 years ago make it a festival that can be ‘owned’ to a greater degree by this island, attracting visitors in the Autumn for one of the world’s favourite cultural moments. There is the long-term potential for a second annual set of festivals on the scale of St Patrick’s Day. Modern day festivals give visitors a reason to travel over the two weeks around Halloween, with promotional materials across markets featuring history, heritage and things to see and do in the Autumn season.



Winter breaks: with cities increasingly offering Christmas markets and New Year’s celebrations in the festive season the island can compete overseas for Winter breaks, winning visitors to world class attractions, social and cultural experiences.

Grow the value of tourism across regions: with 70% of tourism jobs outside of Dublin or Belfast¹, tourism can be a powerhouse for regional innovation, entrepreneurialism and employment. Supporting regional spread of visitors not only benefits employment but also avoids congestion and overtourism sentiment in ‘hotspots’. Tourism Ireland will target faster growth across regions at +6.5%, outpacing overall momentum. In the instance that accommodation capacity is a constraint, increasing utilisation or average occupancy of the accommodation that exists in order to drive improved outcomes will be an alternative measure. To support regional growth of inbound tourism:



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.



Market compelling regional ‘icons’ i.e. visuals of things to see or do in regions like Hidden Heartlands or North 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.



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.

¹ CSO/NISRA/Fáilte Ireland data.



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.



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



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 to an increased number of businesses in the course of the plan.



Market gateway cities and dispersal: recognising visitors typically start their visits in cities and many only visit one place, refresh competitive positioning of cities to win visitors to the island, including reasons to travel beyond that one gateway. Pursue ‘plus one’ strategies for Mainland Europe (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^{5/17}, 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, these strategies are also listed here:



Drive visitation through Northern Ireland dedicated creative – focused in 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 growth¹⁸ 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 cooperative 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.



Leverage uniqueness 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.



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

Connect this island to the world with air and sea partners: as an island, connectivity is vital to an open economy, business, and tourism. Tourism Ireland can play an important role stimulating visitor demand for key routes, with broader benefits for society. Tourism Ireland will play an active part with airlines and airports, ferry operators and sea ports to secure and exploit the potential from new routes with inbound relevance. We will also work with operators to extend the season of strategically important routes. Cooperative 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: facilitate >1000 tourism SMEs per year with B2B and/or B2C promotion, including >333 selling Northern Ireland. Ensure access to overseas data and analysis, helping to facilitate overseas opportunities. Examples of partnership with tourism 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 lead on business events marketing that supports growth of inbound meetings and incentives tourism. Business travel contributes more than €1.1B / £950M¹ to the island economy annually. It is high value in more ways than one, in that business visitors often bring enterprise connections and choose stays midweek or out of peak season. Tourism Ireland will create overseas platforms that facilitate local island of Ireland businesses selling to leading events organisers and trade in overseas markets, with the goal of supporting +8% business events revenue on average year over year to 2030.

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. The tourism partner ecosystem of today includes a wide array of intermediaries from tour operators to online travel agents to emerging generative AI agents. 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.

Tourism Ireland has established benchmark return on marketing investment from B2B activity, including events and tradeshow, allowing the organisation to optimise our presence and drive maximum impact through B2B activity, benefitting tourism and businesses and communities on the ground.

Win value adding visitors through partnership with major sports & cultural events:

sporting or cultural events represent unique opportunities, giving visitors compelling reasons to travel. Tourism Ireland has promoted key sporting events overseas such as The Open at Royal Portrush (2025) or the Aer Lingus American College Football Classic, in both instances, contributing to economic benefits well in-excess of €100M / £87M. Indigenous, repeatable, ownable festivals and events can be grown over time to create fame and impact.

Tourism Ireland will generate demand overseas for milestone sporting and cultural events 2026-28, which have the potential to stimulate travel from high value visitor segments. On an ongoing basis, golf attracts high spend visitors, with the Ryder Cup in 2027 as a spotlight moment. Hiking is the most widely undertaken activity, enjoyed by >2M visitors per year¹⁹. Water based activities, from boat trips to kayaking to angling showcase appealing ways to enjoy diverse landscapes and will feature in overseas promotional materials. Activity tourism partnerships will provide ongoing support for this sector.



Tourism Ireland is a key team player for the island: with NSMC approved strategies co-developed in collaboration with departments and sister agencies. Tourism is always an act of teamwork – with promotion of our island destination tying into product and industry development on the ground by the private sector, Fáilte Ireland and Tourism Northern Ireland. 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, attracting visitors 'Coast to Coast' in the North West and to upcoming border region developments at Cuilcagh, Sliabh Beagh and Carlingford Lough in collaboration with partners and government stakeholders.



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. We welcome moves by air and sea carriers towards fuel efficiency or more sustainable fuels. Visitors are often happy to fly, but want to feel they are contributing to social and community sustainability, and preservation of place on the ground.

their county² and this is a level of support to retain, particularly in light of over-tourism concerns in other destinations.



50% of consumers agree they would pay more for sustainable accommodation and experiences, and interest in this area is set to grow.



Tourism Ireland will focus on:

- **Slow tourism:** promote responsible tourism with dwell time in communities and nature, leveraging greenways, blueways and ecotourism offerings. 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 Shannon-Erne waterways, North Wild Atlantic Way, coastal Belfast, coastal Dublin and the Causeway Coastal Route. Leverage 'coolcation' trends to win visitors to the island in summer.

- **'On the ground' transport:** Partner to support and market easier 'low impact, high benefit' travel around the island. Knowing over half of all visitors will not use a car on their trip to the island, showcase ways to explore via public transport, benefitting regional spread and community impact.
- **Revenue per carbon footprint:** factor the distance travelled vs economic impact into Market Opportunity Mapping and market prioritisation. 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:** improve our own footprint. 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.



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

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. 98% of staff actively contributed to the development of this corporate plan, through workshops and feedback. At Tourism Ireland, we are proud to be certified as a 'Great Place to Work'. Our values are Respect, Ownership, Creativity and Collaboration, laddering up to driving collective impact for tourism. Over the course of this plan we will:

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. 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. We will roll out 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 the course of this plan 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: we will complete 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. Tourism Ireland will review 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 for those activities

Tourism Ireland is proud to support Ireland’s Tourism Policy Statement 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.

Strategic objectives, activities and measures

Business Objective	Corporate Plan Activity	Corporate Plan Indicators	Delivery Timing
Grow strategic source markets	Roll out extensive B2B and B2C marketing across priority, funded market areas.	Grow by ~6% on average each year to reach €10.25B/£8.9B from overseas tourism in 2031 with growth across market areas.	On track for 2031 by 31 December 2028, with regular check-ins.
	<p>Diversify markets.</p> <p>Deepen and defend US.</p> <p>Diversify growth with Mainland Europe and Canada.</p> <p>Grow GB from strong foundations.</p> <p>Unlock nascent markets with partnerships.</p>	<p>Achieve diversified growth across market regions, laddering up to the whole of ~6% average y/y growth by 2031.</p> <p>Play our role in supporting diversified air access, through 15:1 ROI on cooperative marketing for new air and sea routes.</p>	On track for 2031 by 31 December 2028, with regular check-ins.
Compete to win value adding visitors	Win value adding visitors.	Growth is powered by increased bed nights (volume) and spend per trip (value).	On track for 2031 by 31 December 2028, with regular check-ins.

	<p>Elevate Tourism Brand Ireland to compete effectively.</p> <p>Compel high value visits through iconic uniqueness (icons of landscape, culture, history).</p> <p>Strengthen islands of Ireland, culinary, diaspora and targeted peace tourism activity.</p>	<p>Increase perceptions overseas of the Island of Ireland as 'worth it' at current price point +5%.</p>	<p>December 31 2028.</p>
	<p>Cut through in today's communication channels (news, TV/video, digital, social and AI) with greatest influence on consumers' travel choices across 14+ markets.</p>	<p>Achieve annual Business Plan Indicators, with granular targets based on annual budget allocations for reach and engagement across channels and publicity benefitting the island and jurisdictions.</p> <p>Refresh Return on Marketing Investment Economic Impact study, achieving above marketing industry benchmark results.</p>	<p>31 December 2027</p>
<p>Year round, grow tourism across gateway cities, regions and Northern Ireland</p>	<p>Drive focused strategies for Northern Ireland across B2B and B2C marketing.</p>	<p>Increase visitor revenue to Northern Ireland by +6.5% on average each year to 2031.</p>	<p>On track for 2035 by 31 December 2028, with regular check-ins.</p>
	<p>Grow year-round tourism through marketing of calendar events and seasons, including Home of Halloween, St Patrick's Day, Winter Breaks.</p>	<p>Increase revenue through the year inc. non-peak seasons.</p>	<p>On track for 2031 by 31 December 2028, with regular check-ins.</p>
	<p>Grow the value of tourism to the regions of Ireland.</p>	<p>Increase revenue to the regions (defined as non-Dublin) by ~6.5% on average per year OR in the case of diminished regional</p>	<p>On track for 2035 by 31 December 2028, with</p>

		accommodation, grow occupancy.	regular check-ins.
	Support quality jobs in tourism.	Support quality jobs in tourism with >300K jobs island wide.	December 31 2028, with regular check-ins on annual Marketing BPIs.
Strengthen go-to market with partnerships of the future	Empower tourism businesses with platforms and insights.	Launch granular spend and overseas visitor analysis through new data partnerships, empowering tourism businesses with insight. Facilitate over 1000 overseas tourism SMEs per year including at least 333 selling Northern Ireland with B2B and B2C marketing platforms.	December 31 2026, and ongoing after that to 2028.
	Win business events strengthening tourism and the knowledge economy.	Business Events growth of +8% on average each year to 2030.	On track for 2030 by 31 December 2028, with regular check-ins.
	Support key tri-agency priorities in terms of marketing major events and rolling out Shared Island initiatives.	Marketing elements of Shared Island campaigns are delivered on budget and on time per development timelines on the ground.	December 31 2028

	Connect key strategic markets to the island with air and sea partners. Stimulate demand through cooperative marketing for strategic inbound air/sea routes .	New air/sea tourism routes promoted through cooperative marketing achieve >15:1 ROI .	December 31 2026, and annually thereafter.
	Foster partnerships that can bring value adding visitors at scale.	Complete an Intermediaries Appraisal . Continually enhance B2B events return on investment vs 2025 baseline.	December 31 2026.
Sustainable tourism respecting communities and place	Promote slow tourism , with dwell time in communities and nature and leverage 'coolcations' trend.	Increase perceptions of the island as suitable for sustainable travel, +5%.	December 31 2028.
	Balance social and community sustainability through tourism with environmental sustainability .	Factor revenue per carbon footprint into Market Opportunity Mapping. Tourism maintains broad support of communities as a force for good with 80-90% approval ratings.	December 31 2028.
World class team, innovating for impact and living our values	Develop our values led culture supporting Tourism Ireland teams to learn, collaborate, innovate and succeed.	Great Places to Work accredited, with a measurably inclusive, innovative culture of continuous development.	December 31 2028, with annual check ins.
	Resourcing – we will review our structure, skillsets and resourcing to deliver strategy and future proof impact.	Organisational Capacity Review is concluded effectively.	December 31 2026.
	Efficiency and integrity – support highest levels of accountability with more efficient integrated systems and ways of working.	Expenditure for the year not to have an unplanned variance of more than +/-1% of the total BP expenditure for the year, achieve full internal audit compliance by avoiding any 'Priority 1' audit points.	December 31 2026, and annually thereafter.

07 *Monitoring and Evaluating Implementation*

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 CPI (Corporate Plan Indicator) has an internal owner who assesses progress of each measure each quarter.
- In addition to monthly summary and quarterly detailed reporting of Business Plan Indicators, a detailed annual Corporate Plan Indicator report is produced and shared with the Senior Management Team, Tourism Ireland Board, and sponsor departments for discussion.
- The outcome of each CPI is reported on within the following Corporate Plan document.



Staff, trade and industry contributed to the plan, alongside our regular work on planning with departmental colleagues. The full plan will be shared with staff, following on from earlier reviews of drafts, in November.

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



Appendix A

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

Tourism Ireland has made strong progress towards achieving the goals outlined in the 2023–2025 Corporate Plan.

We have delivered on the CPIs where we could directly measure and collect results, as shown in the tables below. The Economic and Social CPIs will be confirmed in early 2026, once we receive holiday revenue data from the CSO and NISRA.

Status Key:

- Green – Completed
- Grey – Awaiting Results
- Amber – Partially completed

Economic

CPI	Commentary	Status
CPI 1/6R - In line with our goal to grow inbound tourism revenue on average by +5.6% per annum out to 2030, we will target this same average growth over the remaining life of this Corporate Plan.	<p>Visitor revenue across the island of Ireland in 2024 grew ahead of target to €6.9B/£6B +9%.</p> <p>At the time of writing only data for H1 2025 covering Ireland is available. The CSO reports a softening over this period due to global macro-economic conditions and capacity restrictions.</p> <p>Note: the target is a long-term average growth target to allow for annual variability in reported data.</p>	
CPI 2R - In line with our long-term annual average growth goals for inbound tourism to 2030, Inbound tourism revenue will have a target growth for Northern Ireland of an average of +6.5% per annum (2023-2025).	<p>Visitor spend to Northern Ireland was reported to have softened in 2024 primarily due to a softening in VFR from GB post Covid (visiting friends and relatives). Holidaymaker spend across markets grew. North America demonstrated 23% visitor spend growth, Mainland Europe visitor spend grew +4%</p>	

	and overall share of tourism revenue coming from overseas grew to 58%. Data for H1 is not yet available for 2025.	
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Social

CPI	Commentary	Status
CPI 3R - In line with our long-term annual average growth goals for inbound tourism to 2030, Inbound tourism revenue will have a target growth for the regions of Ireland (outside of Dublin) of an average of +6.5% per annum (2023-2025).	Visitor spend outside Dublin increased by +11% in 2024 compared with 2023. Data is not yet available for 2025.	
CPI 4R - In line with our goal to grow inbound tourism to 2030 Inbound tourism revenue on the island of Ireland in October to May to grow by an average of +6.5% per annum for the period 2023-2025.	October-May data for Ireland (direct) was reported to have grown by +11% in 2024v2023. Data is not available for specific months in Northern Ireland. Q1 and Q4 visitor spend remained stable in 2023/2024.	

Environmental

CPI	Commentary	Status
CPI 5 - By 2025, prioritise the promotion of IOI sustainably certified industry (subject to scheme agreement)	The scheme was not agreed due to changes in the regulatory landscape outside of Tourism Ireland's control. FI & TNI made the Decision not to continue with the scheme due to changes in the regulatory environment.	

Markets

CPI	Commentary	Status
CPI 7 - A Mainland European assessment which will identify the best opportunities for sustainable growth to be completed by end of Q1 2024	The Mainland Europe Appraisal completed and presented to the Board in March 2025.	
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	Operational assessment of Emerging Markets was completed in 2023 as planned. Australia/NZ will be included within the Market Opportunity Matrix project at the end of 2025.	

Customer

CPI	Commentary	Status
CPI 9 - New overseas consumer segmentation model to be embedded within Tourism Ireland and industry and influencing activity by end 2023	A new consumer segmentation model was developed in 2023 and embedded within Tourism Ireland and industry in 2024.	

Industry and Trade

CPI	Commentary	Status
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	A return on market investment model has been developed for B2B. Event attendees supply information on business pipeline to allow assessment of impact of each event.	
CPI 11 - All co-op activities to demonstrate at least a 10:1 return on investment	Median return on investment has exceeded 10:1.	

Organisational

CPI	Commentary	Status
CPI 12 - Diversity & inclusion plan completed by end of 2023	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.	
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	Sustainability training on key skills gaps was undertaken. A consultant has been commissioned to partner with the organisation to improve Tourism Ireland's own footprint.	
CPI 14 - Develop a new marketing effectiveness metric for 2024 activity	Tourism Ireland's vision and new BPIs enable greater monitoring of marketing effectiveness has been implemented. A return on marketing investment assessment was also conducted in 2024 (estimating a 25:1 return) and will be repeated as part of the 2026-2028 Corporate Plan.	
CPI 15 - Benchmark employee engagement survey results against best in industry class and achieve accreditation by end of 2023	Accreditation was achieved in 2023 and 2024 (2025 survey will be conducted at the end of the year).	
CPI 16 - Track the reputation of Tourism Ireland on the island of Ireland by 2025	Completed and findings were presented to the Board in 2025 – 94% of respondents rated Tourism Ireland top two box for effectiveness in marketing the island of Ireland overseas.	
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	No priority 1 audit findings have been identified to date and expenditure is forecast to be within +/-1% of the variance threshold.	

Appendix B

Tourism Ireland	Approved 2025	Proposed Budget 2026			Indicative Budget 2027			Indicative Budget 2028		
<i>€1=0.86 GBP 2025 €1=0.84 GBP 2026</i>	Total	Resource	Capital	Total	Resource	Capital	Total	Resource	Capital	Total
Existing Level Programme	57,187	51,257	14,540	65,797	52,795	9,540	62,335	54,380	9,540	63,920
Total Programme Expenditure	57,187	51,257	14,540	65,797	52,795	9,540	62,335	54,380	9,540	63,920
Pay Costs	18,100	19,916	0	19,916	20,513	0	20,513	21,128	0	21,128
Pension Costs	1,375	1,475	0	1,475	1,516	0	1,516	1,558	0	1,558
Non Pay Administration Costs	12,290	12,463	1,060	13,523	12,837	0	12,837	13,222	0	13,222
Total Administration Costs	31,765	33,854	1,060	34,914	34,866	0	34,866	35,908	0	35,908
Total Prog & Admin Expend	88,952	85,111	15,600	100,711	87,661	9,540	97,201	90,288	9,540	99,828
<i>NI share</i>	21,878			23,397			24,096			24,816
<i>IRL share</i>	67,074			77,314			73,105			75,012
Overall Total Expenditure for approval	88,952			100,711			97,201			99,828
Existing/Projected Staff Numbers (FTE)		168			168			168		
Assumptions/Notes										
<ol style="list-style-type: none"> 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. 3. All figures 2027 and 2028 are substantially just 2026 with an allowance for inflation, with the assumption that €5.0m extra DETE market diversification monies are not repeated in 2027 or 2028 and that there is no inflation element in capital funding. 4. The € to £ exchange rate for 2026 through 2028 remains at €1 = £0.84. 										

Appendix C

Images used within this document.

Location	County
Ballintoy Harbour	Antrim
Belfast City	Antrim
Dark Hedges	Antrim
Dunluce Castle	Antrim
Cloughoughter Castle	Cavan
Doonagore Castle, Doolin	Clare
Allihies	Cork
Spike Island	Cork
Fanad Lighthouse	Donegal
Ardglass Golf Course	Down
Killiney Hill	Dublin
Trinity College	Dublin
Cuilcagh Boardwalk	Fermanagh
Lough Erne	Fermanagh
Connemara	Galway
Derryclare Lough	Galway
Dunquin pier	Kerry
Carton House	Kildare
Kilkenny Castle	Kilkenny
Slieve Bloom	Laois
Adare Manor	Limerick
Carlingford	Louth
Clew Bay	Mayo
Keem Bay	Mayo
Esker Hills Golf Club Tullamore	Offaly
Lough Key	Roscommon
Classiebawn Castle	Sligo
Oysters, Taste of Sligo Food Tour	Sligo
Carrick-on-Suir	Tipperary
Moorlough Lake	Tyrone
Belvedere House	Westmeath
Old Rail Trail Greenway	Westmeath
Puffins, Saltee Island	Wexford
Blainroe Golf Club	Wicklow

Appendix D

Footnotes:

- 1 Tourism Ireland’s analysis of CSO/NISRA data; note, all pre-pandemic volume and value data refers to official data collected under a different methodology.
- 2 OAG data analysed by Tourism Ireland.
- 3 Targets base year 2024.
- 4 Tourism Vision & Action Plan: 10 Year Plan.
- 5 RedC / Tourism Ireland Sentiment Tracker.
- 6 MCCP research commissioned by Tourism Ireland.
- 7 STR.
- 8 www.gov.uk/eta/apply.
- 9 Tourism Ireland internal reporting.
- 10 Tourism Ireland 2023-2025 Corporate Plan.
- 11 Tourism Ireland analysis from CSO, NISRA and Fáilte Ireland data.
- 12 Media agency tracking.
- 13 Kantar research commissioned by Tourism Ireland.
- 14 Survey of Travellers data – Fáilte Ireland.
- 15 ROMI estimate based on Tourism Ireland research.
- 16 Fáilte Ireland.
- 17 REDC Global Travel Survey.
- 18 NISRA; note, all pre-pandemic volume and value data refers to official data collected under a different methodology.
- 19 Tourism Ireland analysis based on Fáilte Ireland data.

