



Tourism Ireland

**MARKETING PLANS**

**2025**



A panoramic view of a mountain landscape. In the foreground, a wooden walkway with railings leads down a grassy slope. Three hikers are visible on the walkway, looking out over the valley. The middle ground features a large, flat valley with a winding path and a small blue lake. The background shows rolling hills and a clear blue sky with light clouds. The overall scene is bright and scenic.

**Karen Patterson**



A wide-angle photograph capturing four riders on horseback galloping across a sandy beach. The riders, dressed in equestrian attire including helmets and jackets, are moving from left to right. Their horses are splashing through shallow water, creating a dynamic scene of white spray. In the background, a massive, dark, moss-covered cliff rises vertically, featuring a prominent natural rock formation and a dark, arched tunnel entrance. A vibrant rainbow arches across the sky above the cliff. The ocean waves are visible in the distance under a clear, bright sky.

# Christopher Brooke

Chairman





**Conor Murphy MLA**  
Economy Minister





**#TI2025**





# Alice Mansergh

Chief Executive



Welcome







# Our Tourism Ecosystem





## Overseas tourism matters

**£672m**

per annum

Source: NISRA





**Overseas tourism matters**

Of

**~70k** **+60%**

**tourism jobs**

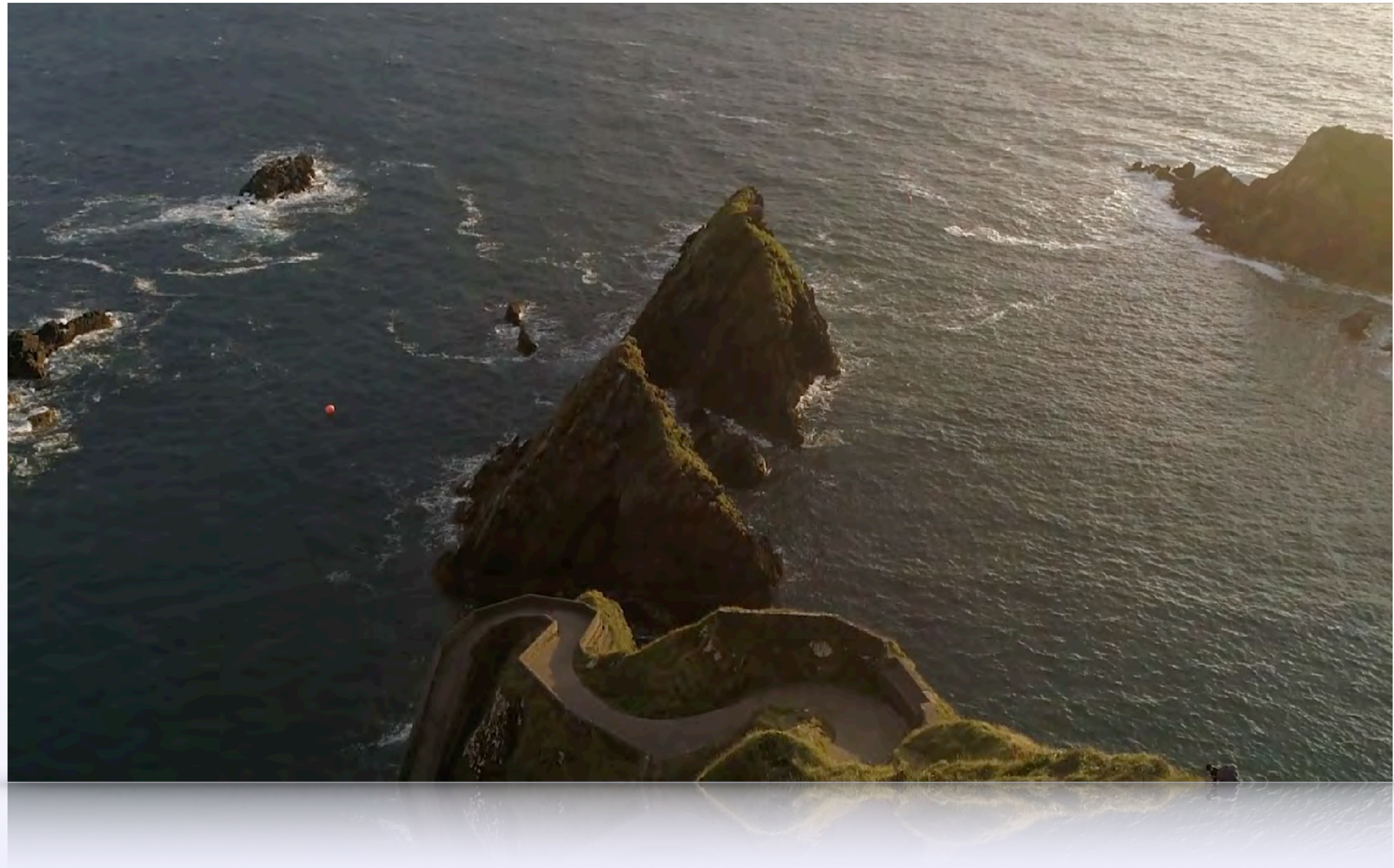
**rely on overseas**





Thank You









## Bringing value to this island

£1 → £25

Source: Estimated from Kantar research study





# Looking ahead: strengths

## 4 S's



Sentiment



Supply of accommodation



Scenery



Soft influence





# Looking ahead: challenges

## 4 C's



Capacity



Cost



Concentration



Complexity





## **Vision**

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

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





**Increase the Value of Overseas Tourism**





# Increase the value of overseas tourism

Revenue growth

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





# Increase the value of overseas tourism

NI, regional and seasonal growth

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





# Increase the value of overseas tourism

Worth

**£1.3bn**

to Northern  
Ireland  
by 2035



# Increase value: strengthening strategic access



**Demand for NI and regional routes**

**Inbound visitors on Dublin routes**

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





## Increase value: Enrichment Explorers

Focus on visitors with  
**‘value adding tourism traits’**  
– likely to see more, do more, enjoy  
more and spend more while on the  
island



## Study of Enrichment Explorers



Source: Kantar research output



## Visitor spend: island of Ireland

€ million

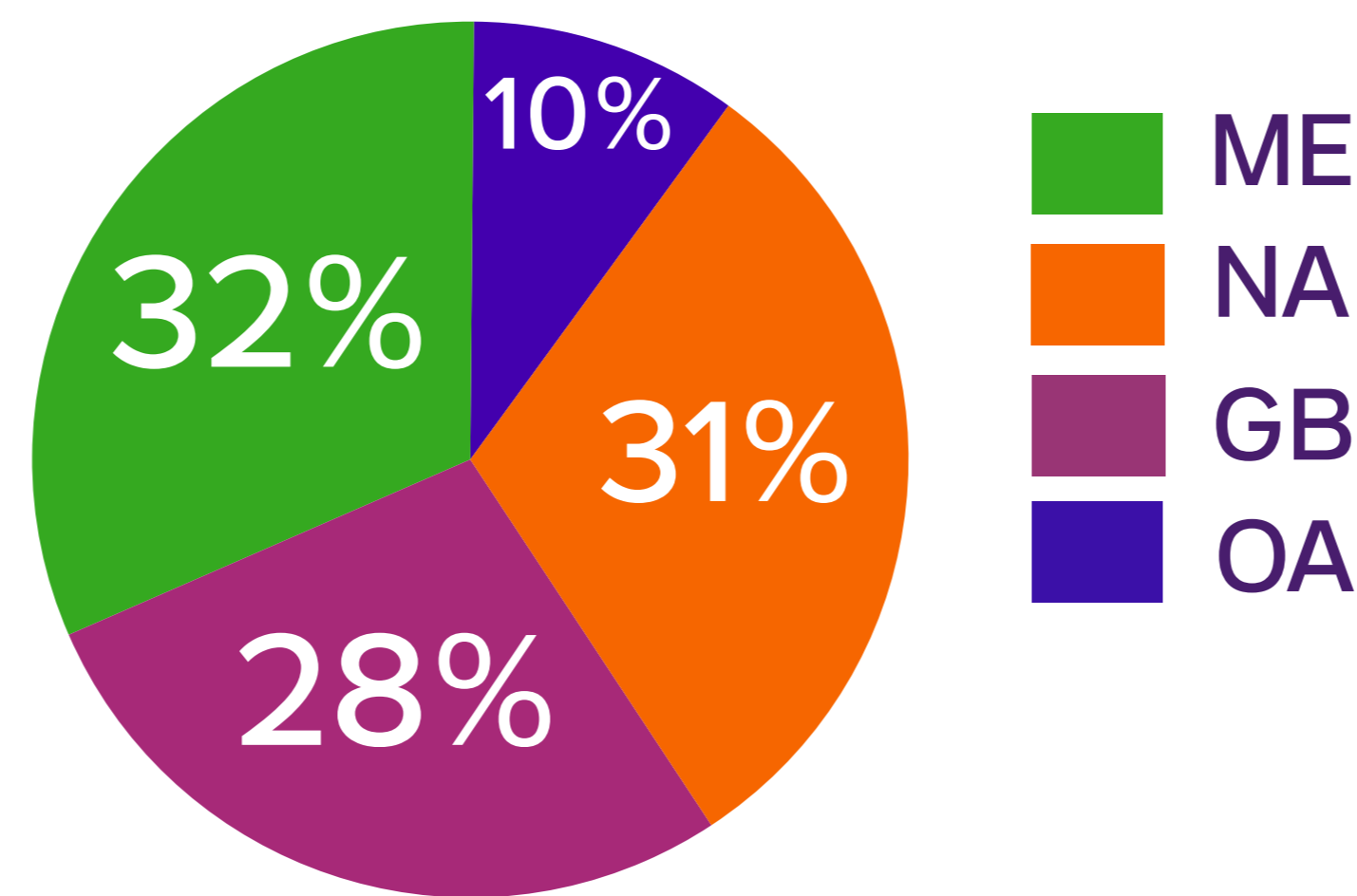
2,000

1,000

0

US  
Great Britain  
Germany  
France  
Spain  
Canada  
BeNe  
Italy  
Nordics  
Switzerland

2023  
2024



## Increase value: market growth and diversification

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

Win more **US** revenue for **NI**

Build strong foundations from **GB**

**Mainland Europe** appraisal to drive share  
breakthrough

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



# Supporting Economies and Communities





# Over-tourism headlines hit Europe

**Le Monde**

INTERNETJOURNALE - LECTURES

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

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



**Opinioni**

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

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



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

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



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

**INDEPENDENT**

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



**Forbes**

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



**sky news**

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

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



**EL PAÍS**

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

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



**SPiegel Panorama**

### 20.000 Menschen marschieren auf Mallorca gegen Massentourismus

«Der Luxus, unser Glück! Mit solchen Slogans machen Mallorca neugierig und Mallorcaer ihrem Ärger über einen Damm. In Palma Luft. Sie beklagen die Folgen des Tourismus – Staus, Druck und lauten die Wut.»



**The Guardian**

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

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







# We have a chance to do things differently

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

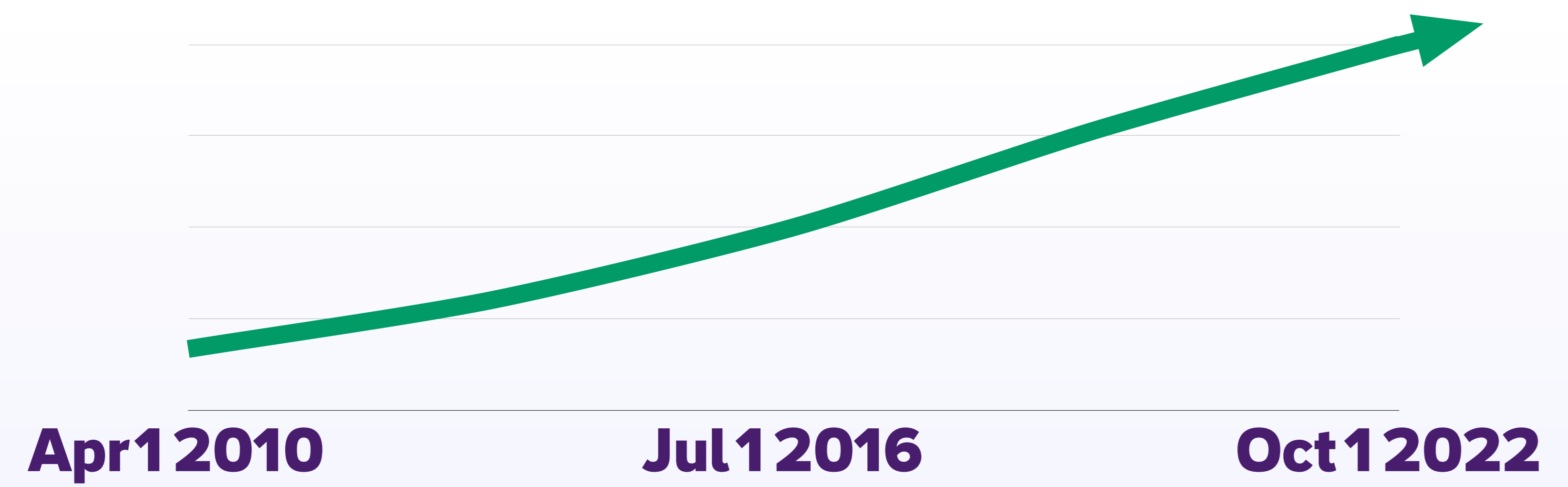
Largest indigenous shared industry on this island

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



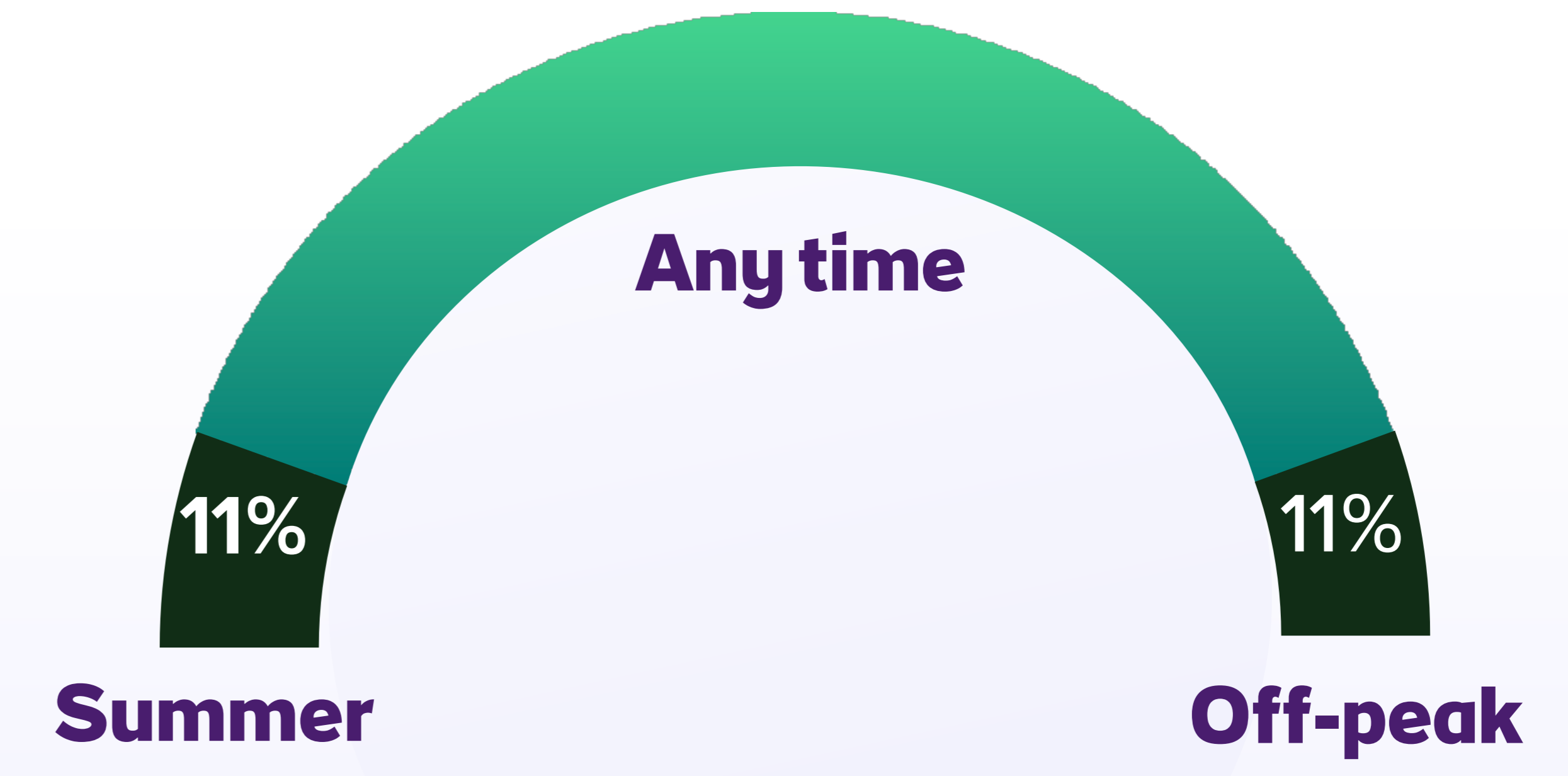
# Tapping into visitor sentiment

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



Source: Google Trends

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



Source: Red C / Tourism Ireland Sentiment Tracker



# Spread across seasons: 'must visit' moments



**Spring**  
St Patrick's Day



**Summer**  
'Slow Tourism' month



**Autumn**  
Halloween



**Winter**  
Winter breaks





# St Patrick's Day

Results:

**230m** Reach

**Ireland Week** in 11 cities across Europe

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

**2025:**  
Focus on  
festivals and  
global unifying  
moments





# Home of Halloween

**2025:**  
Focus on  
festivals and  
things to do

**Results:**

**>200m**

Opportunities  
to see

**14M YouTube**

**2X** recognition of origins in Ireland

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









# Championing communities

**1bn**

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

**70%**

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

**500m**

**Publicity opportunities to see NI message**





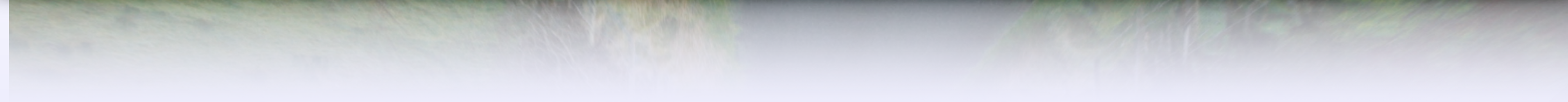
# Fill your heart with Ireland road trip

Results:

**40m** Opportunities  
to see

**+90% persuasion**









# Shared Island: vision for the North West

Two awe-inspiring coasts, one epic trip

Connecting the Causeway Coast and Wild Atlantic Way for visitors



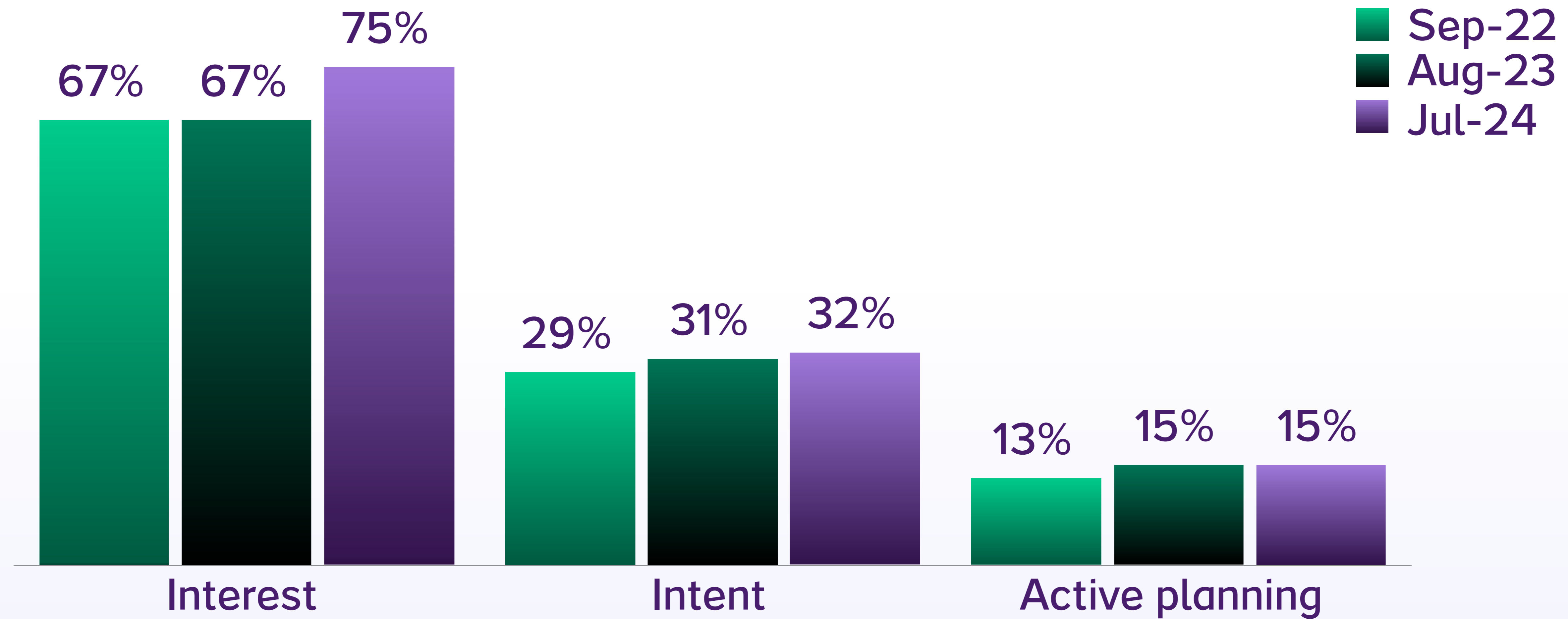


**Aidan Power**  
Director of Marketing

# Inspiring Visitors



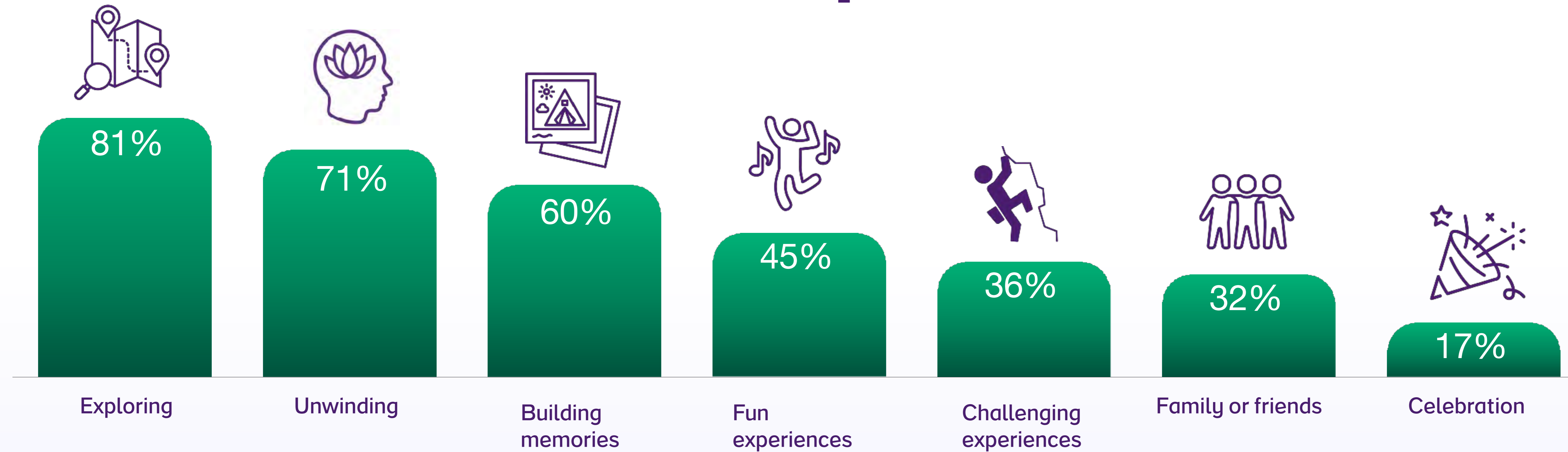
# Visitors are interested in the island of Ireland



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



# Desire for exploration



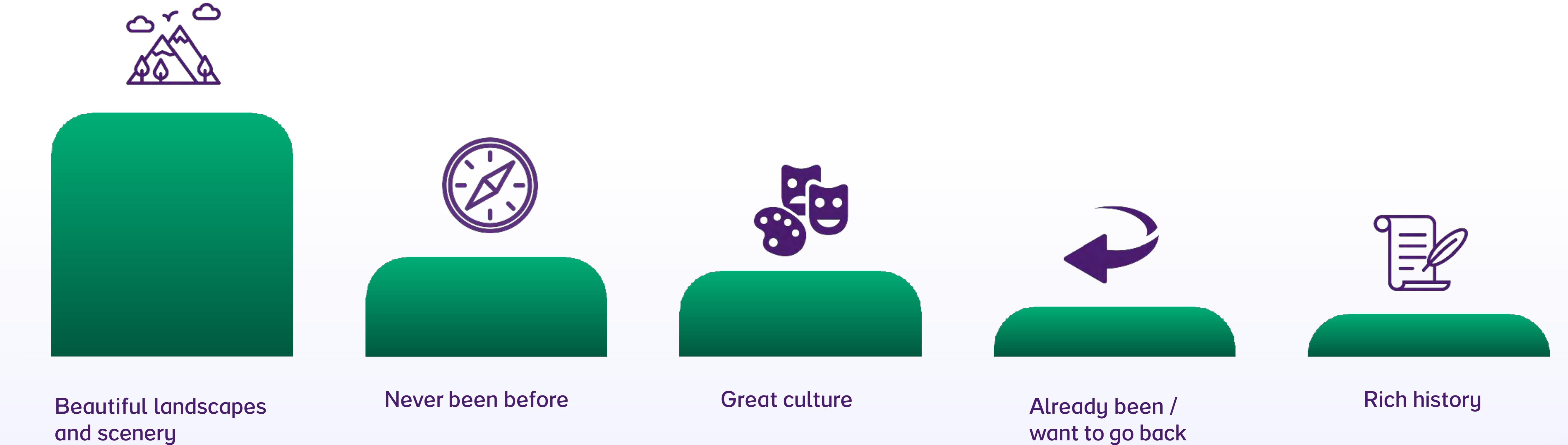
## Needs of travellers

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



# Landscape, culture and history are reasons to visit

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



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



# How people research and book travel is changing



Early 2000s

Travel agents and brochures



Mid 2000s

Ever-increasing role of travel websites



Late 2000s - 2020  
Age of mobile

Rise of mobile search, social and online video



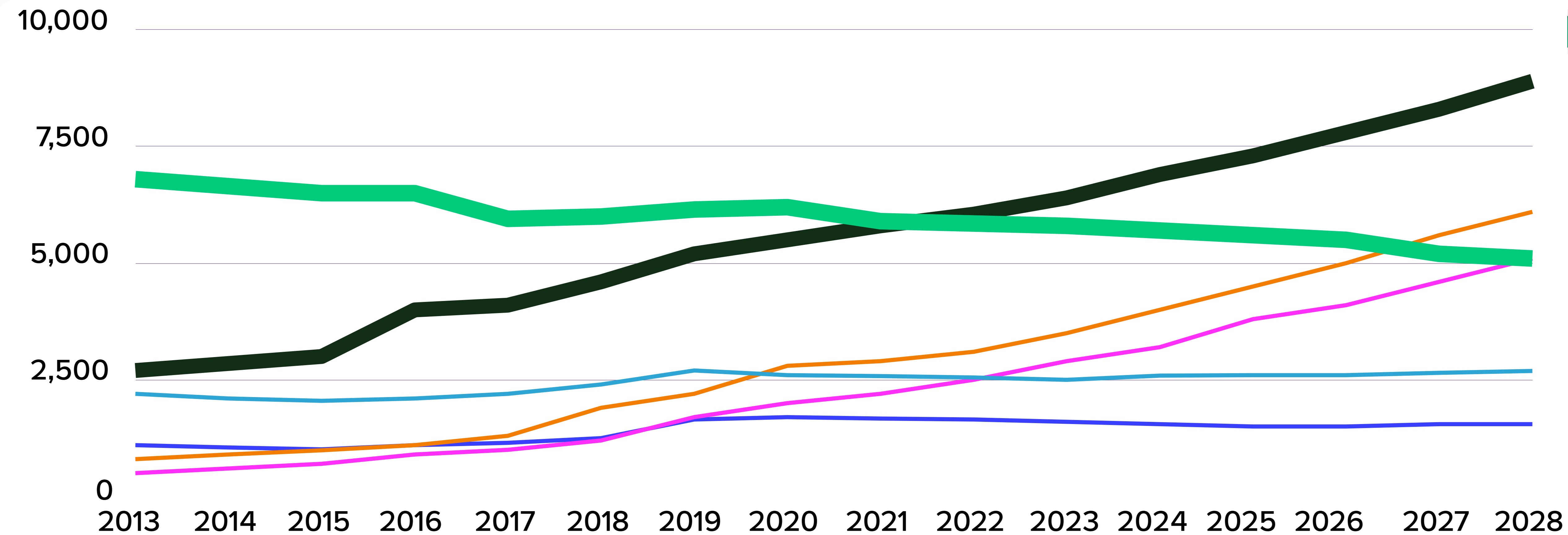
2020 - 2030  
Rise of AI

AI trip planners



# More time now spent on social than TV

Among 30-60 year olds globally



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

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

Source: Global WARC study





# Winning visitors: an art and a science







## **Visitor awareness and consideration**

– telling our story overseas

**2025 new brand campaign**

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





## **Visitor awareness and consideration**

– teeing up others to speak for us



# Visitor awareness and consideration

– teeing up others to speak for us



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





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



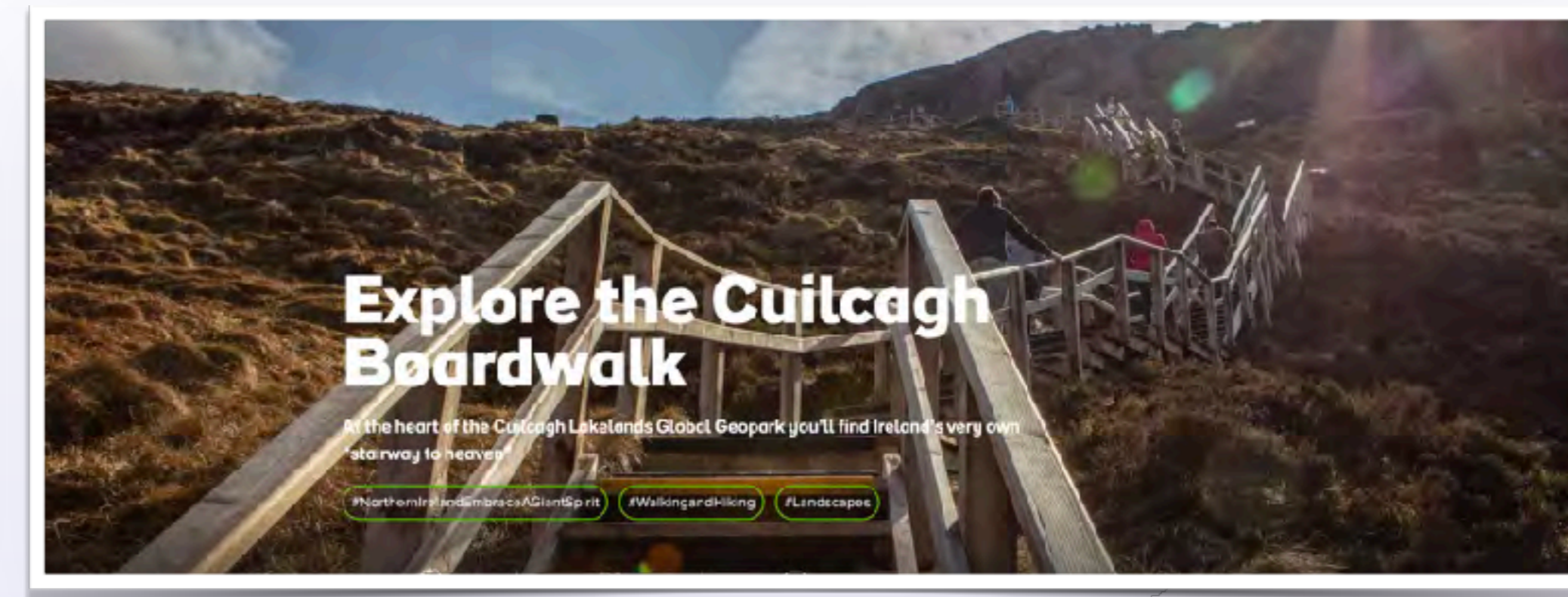
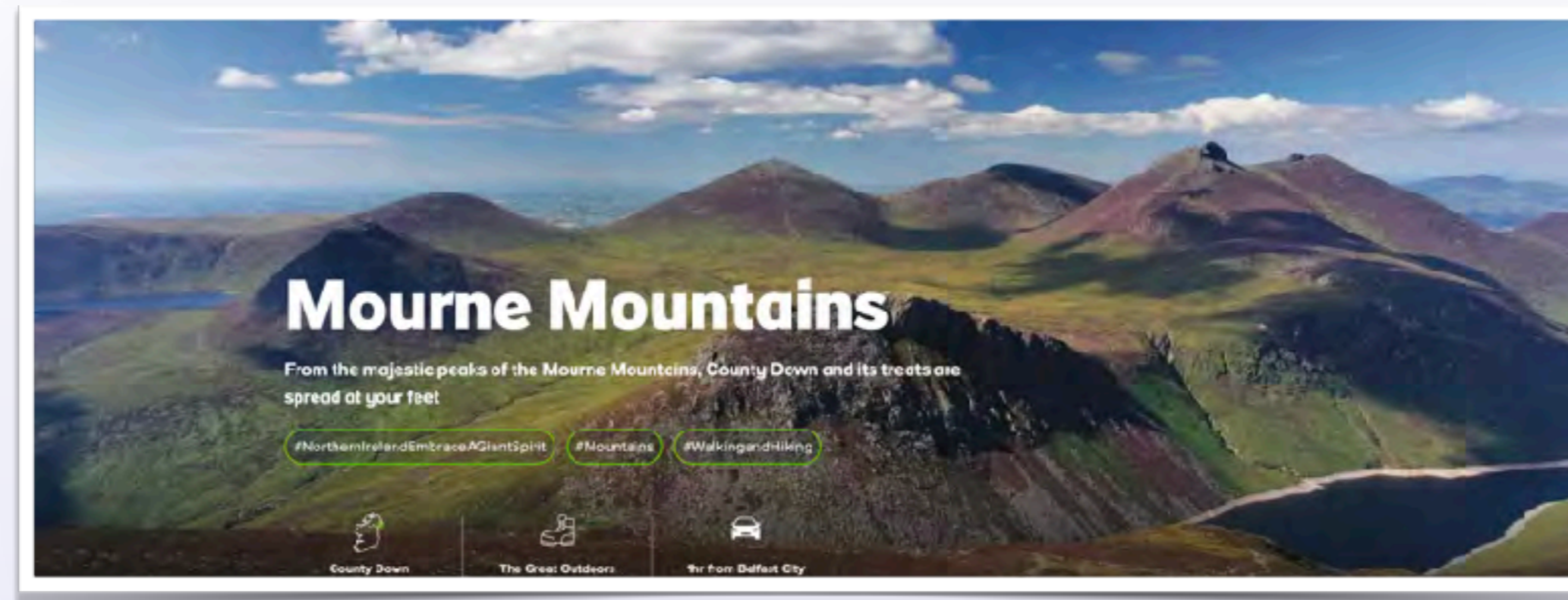
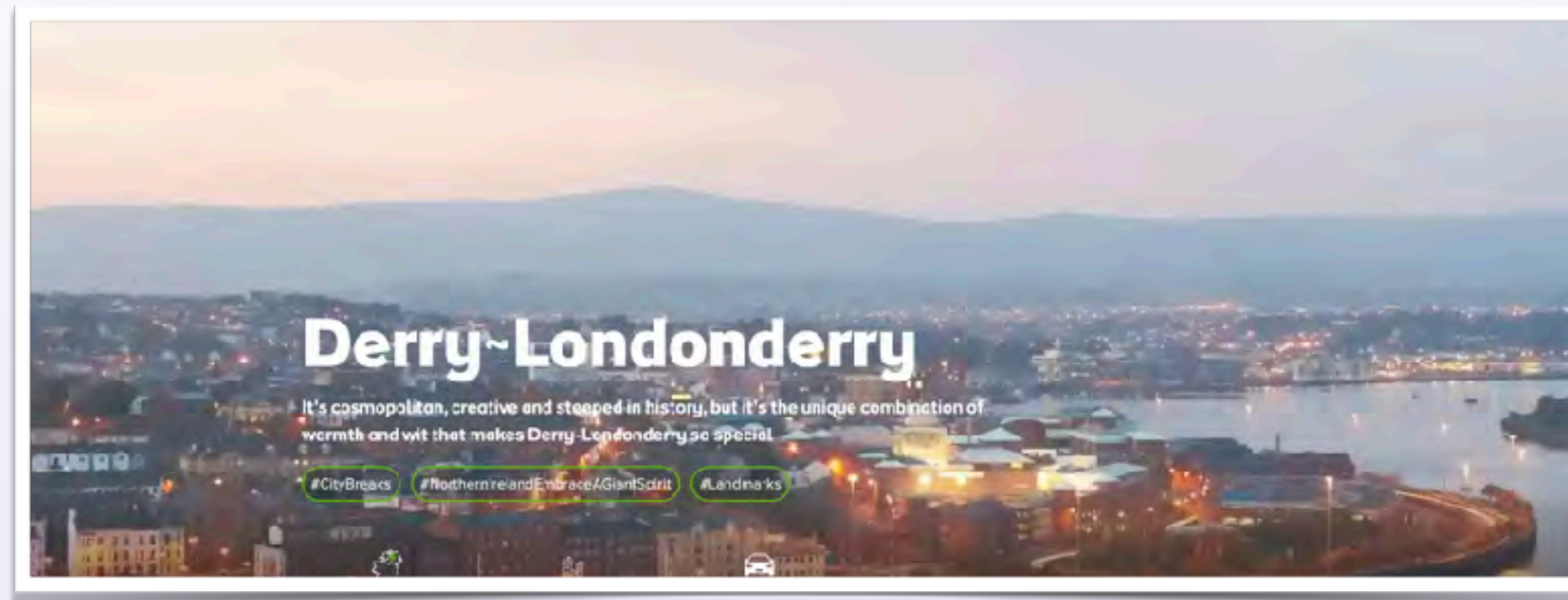
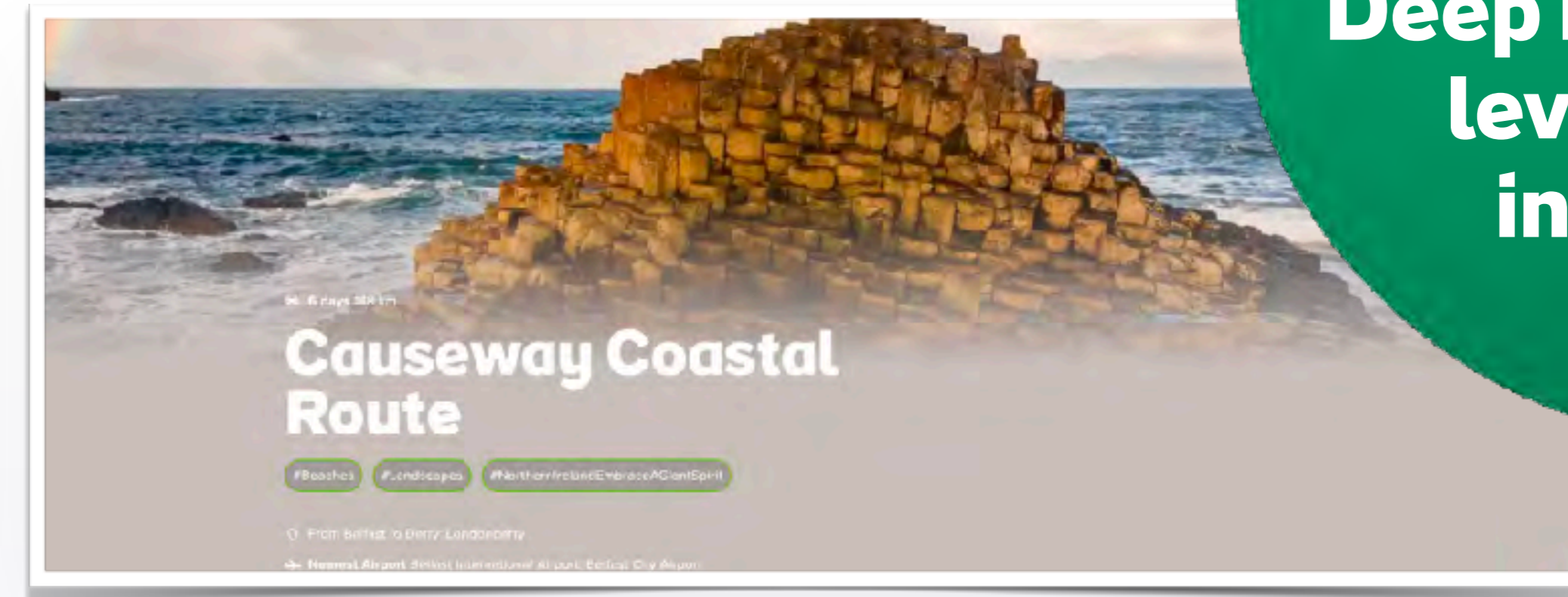
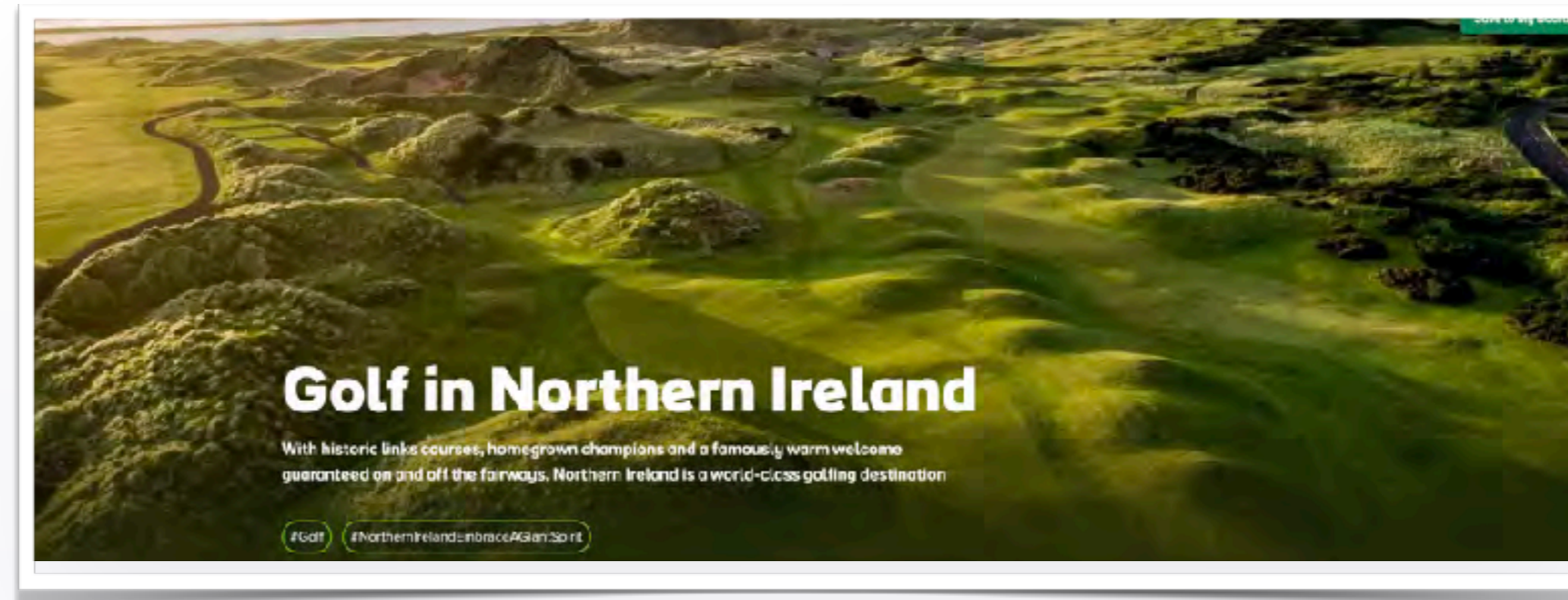
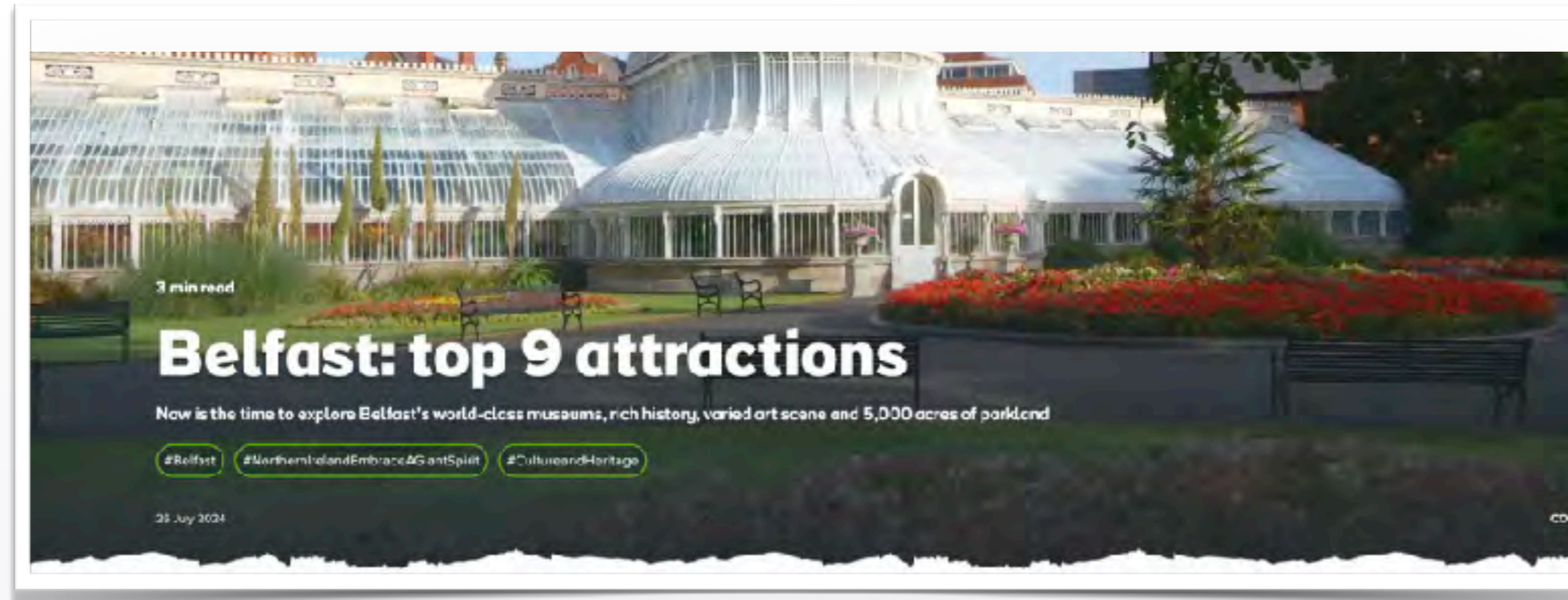


**I Viaggi del Cuore**  
Canale 5 (Italy)



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

**2025:  
10m**  
Deep research visits,  
leveraging and  
informing AI







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

**2025:  
7.5m  
Followers on  
social**



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







# Sustainability

**Shane Clarke**

Director of Corporate Services,  
Policy & Northern Ireland





# Sustainability: responsibility

EU targeting **decarbonisation** of aviation

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

**2025:**

Grow revenue responsibly,  
factoring in revenue per carbon footprint





**Sustainability: opportunity**

**50%**

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

Source: MCCP / Tourism Ireland





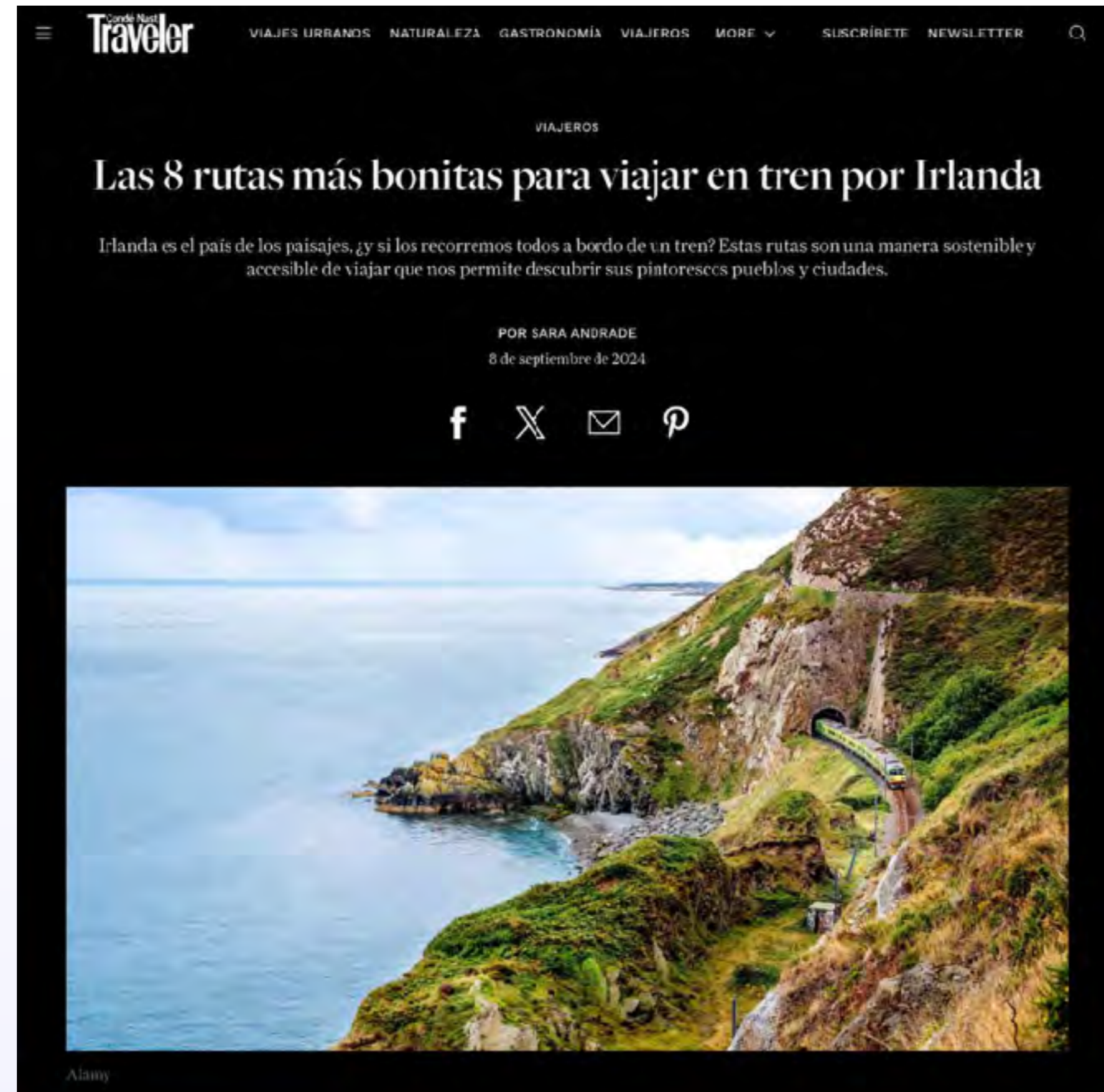
# Rory Best's Northern Ireland

## Sustainability: opportunity

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



# Sustainability: slow tourism







**Siobhan McManamy**

Director of Markets &  
Partnerships

# Strengthening Partnerships



# Access partnerships

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

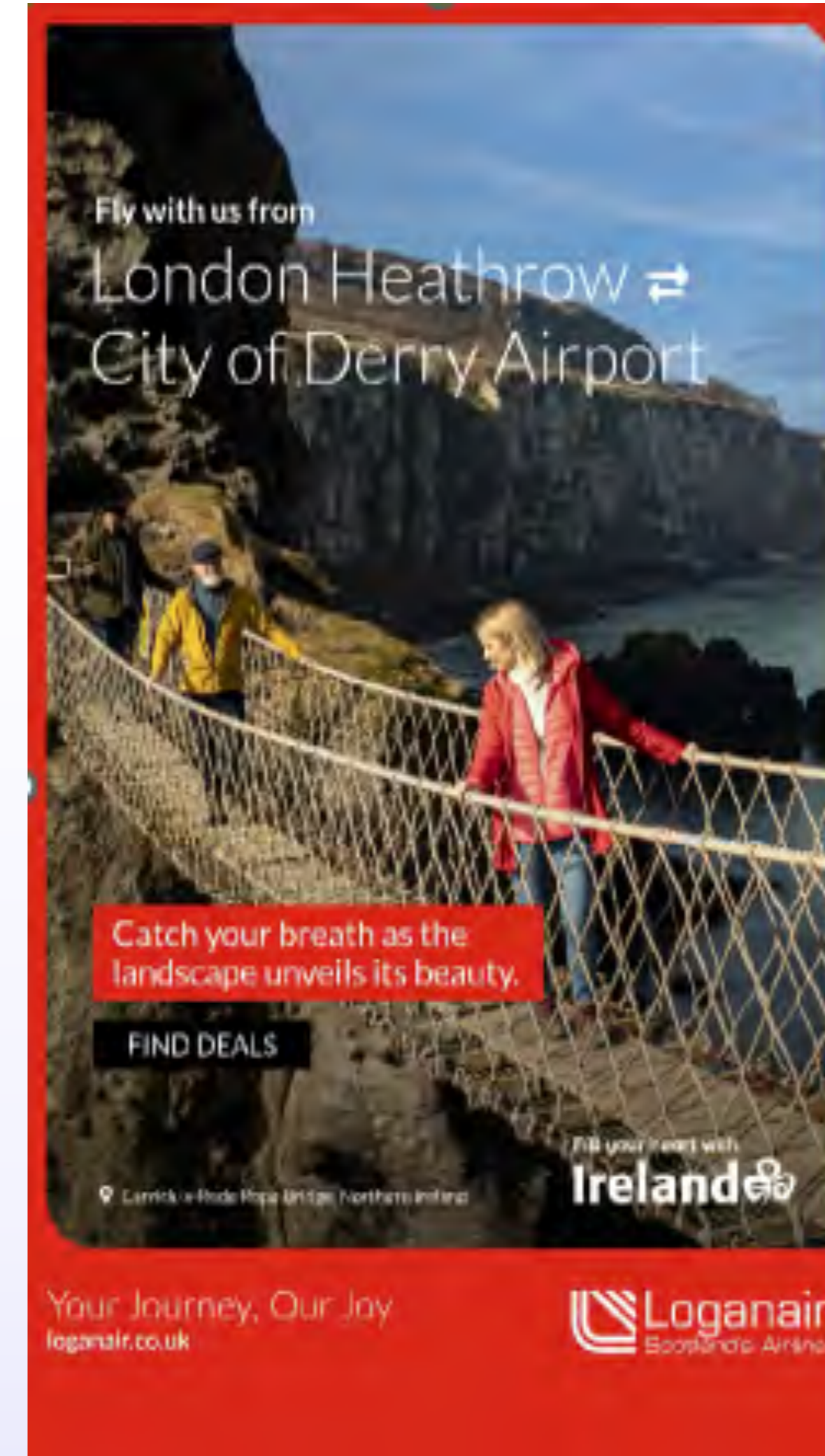
Plane deine Reise nach Nordirland mit Lufthansa!



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

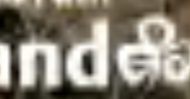
ABGs von Lufthansa auf [www.lufthansa.com](http://www.lufthansa.com)


Fly with us from London Heathrow ⇄ City of Derry Airport



Catch your breath as the landscape unveils its beauty.

FIND DEALS

Fill your heart with **Irlande** 

Your Journey, Our Joy  **Loganair**  
[loganair.co.uk](http://loganair.co.uk)

Fly with us from Aberdeen ⇄ Belfast City Airport



Unveil the layers of a city's past, where history meets culture.

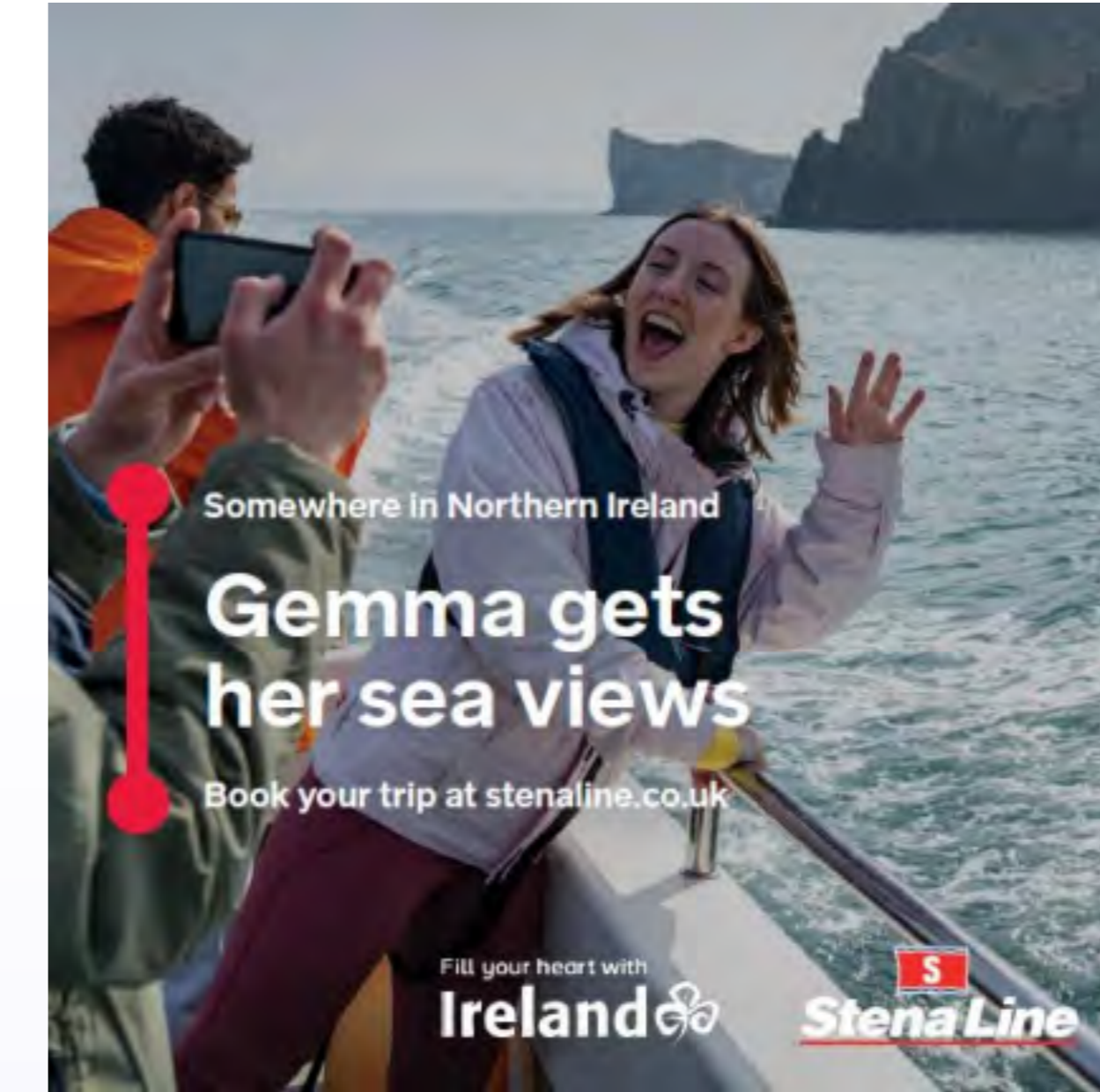
FIND DEALS

Fill your heart with **Irlande** 


Your Journey, Our Joy  **Loganair**  
[loganair.co.uk](http://loganair.co.uk)

Somewhere in Northern Ireland

Gemma gets her sea views



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

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

**RYANAIR**

**FLY TO BELFAST**

**BOOK NOW**



Fill your heart with **Irlande** 





# Global partnerships

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







## **Golf**

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

Amplify **The Open at Royal Portrush**

**Ryder Cup, Adare Manor**

**2025:**

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

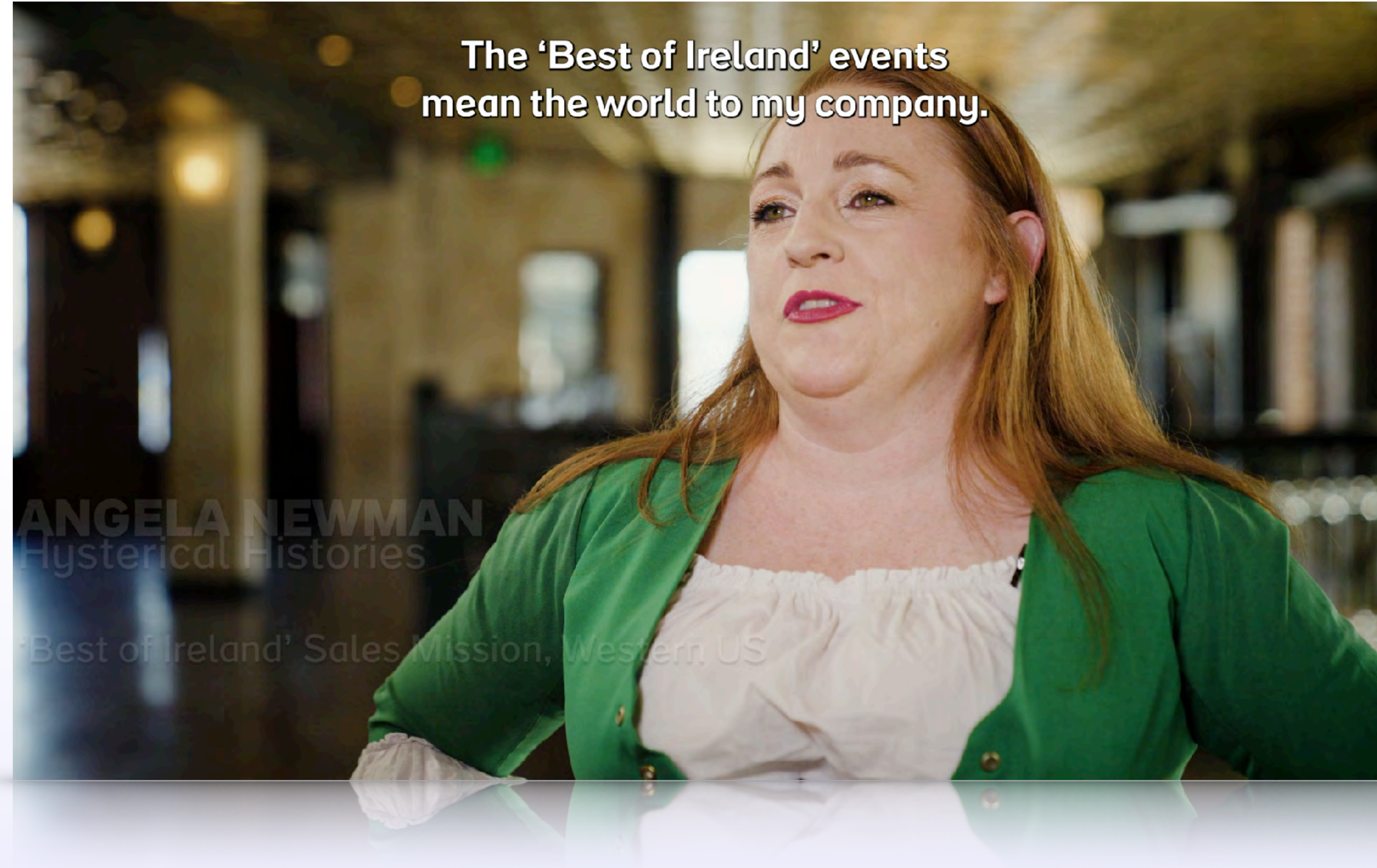


The 'Best of Ireland' events  
mean the world to my company.

ANGELA NEWMAN  
Hysterical Histories

'Best of Ireland' Sales Mission, Western US

**Global platforms for  
island of Ireland  
businesses**







# Global platforms for island of Ireland businesses

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

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

2025:  
Support  
**250**  
NI  
businesses

Global  
Partnerships  
team





# Win Business Events

New Business Events strategy  
Meetings and incentive travel

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





# Partnership with Tourism Northern Ireland

**John McGrillen**

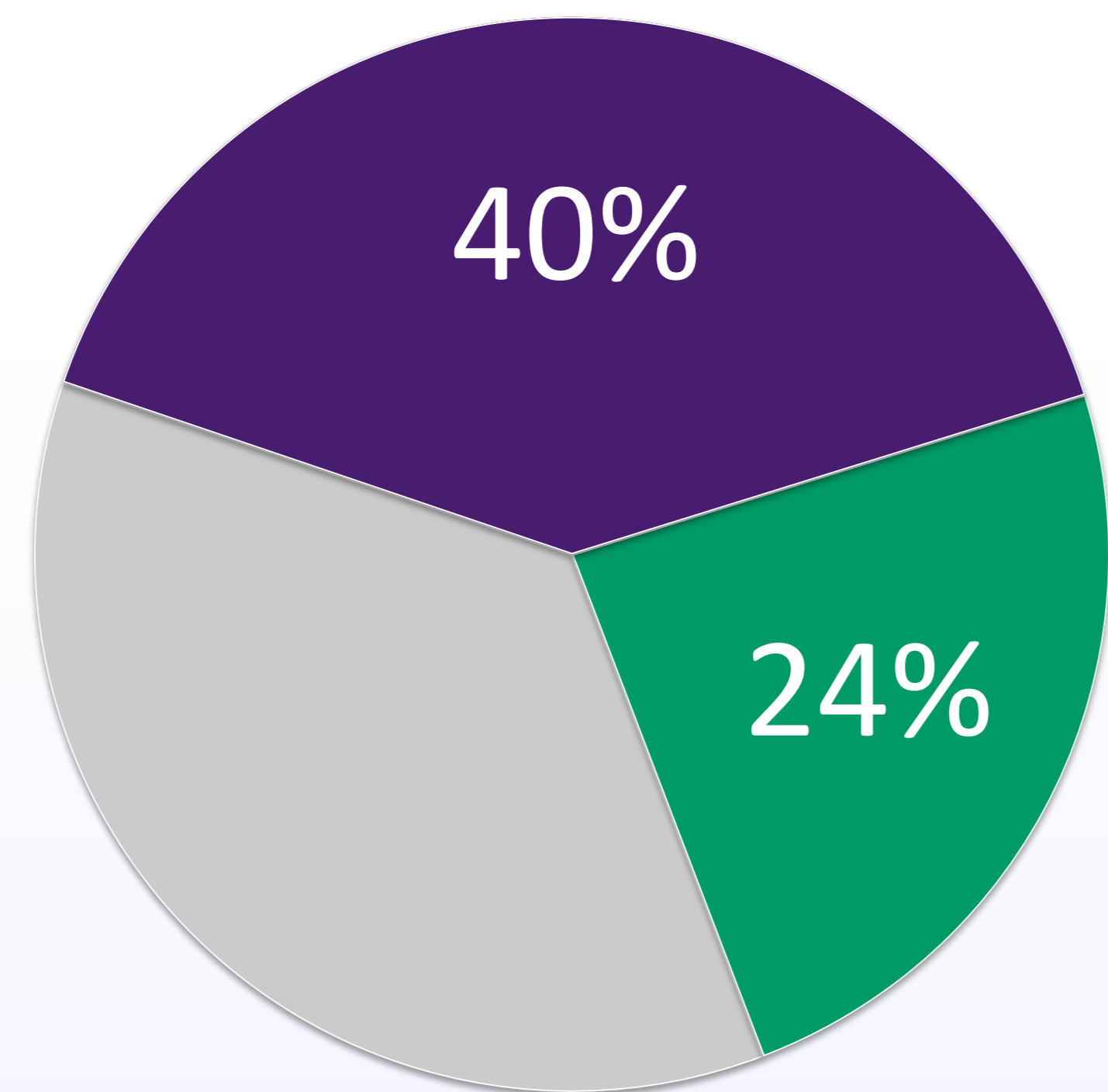
Chief Executive,  
Tourism Northern Ireland



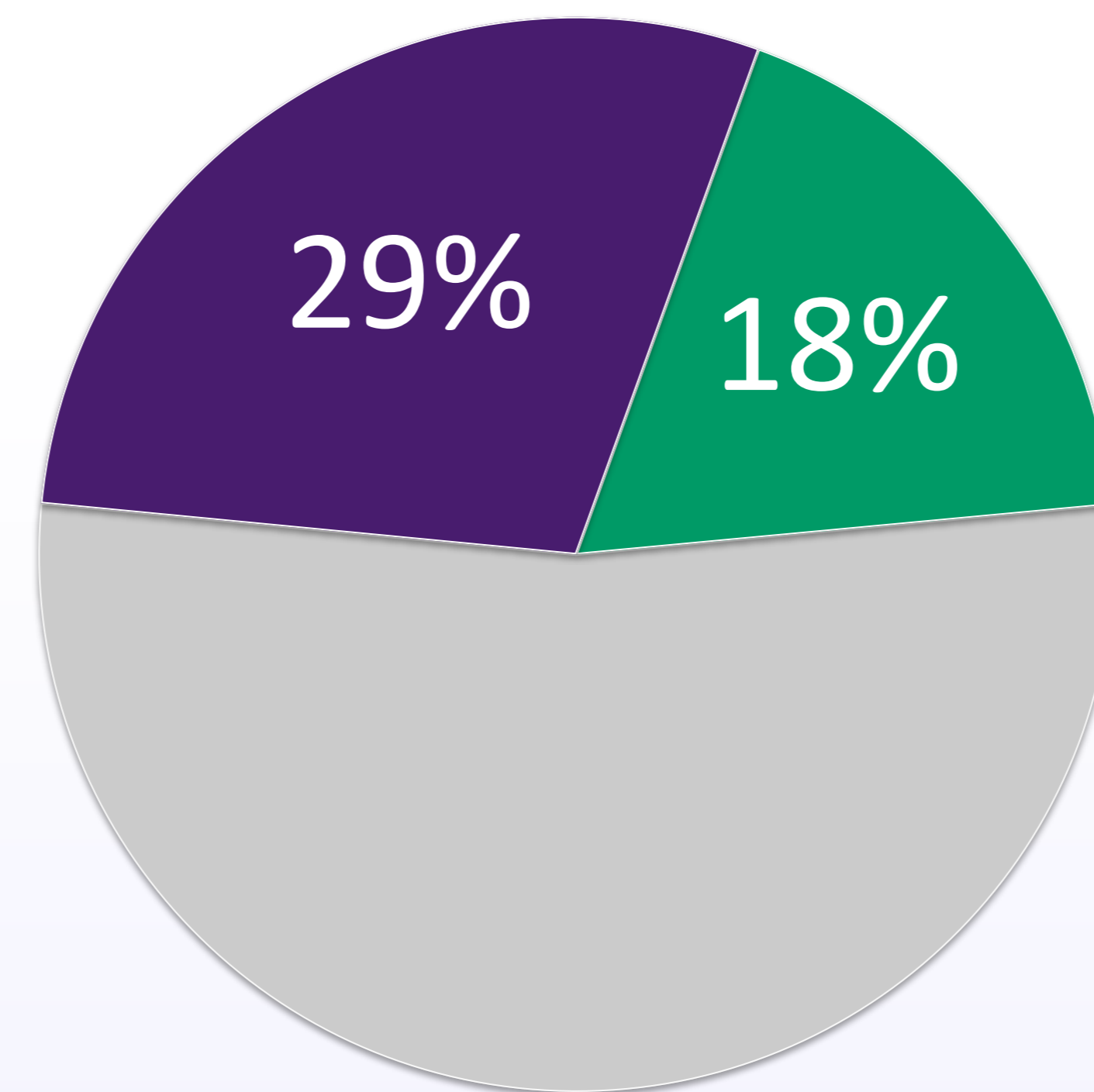


# Importance of the Domestic Market

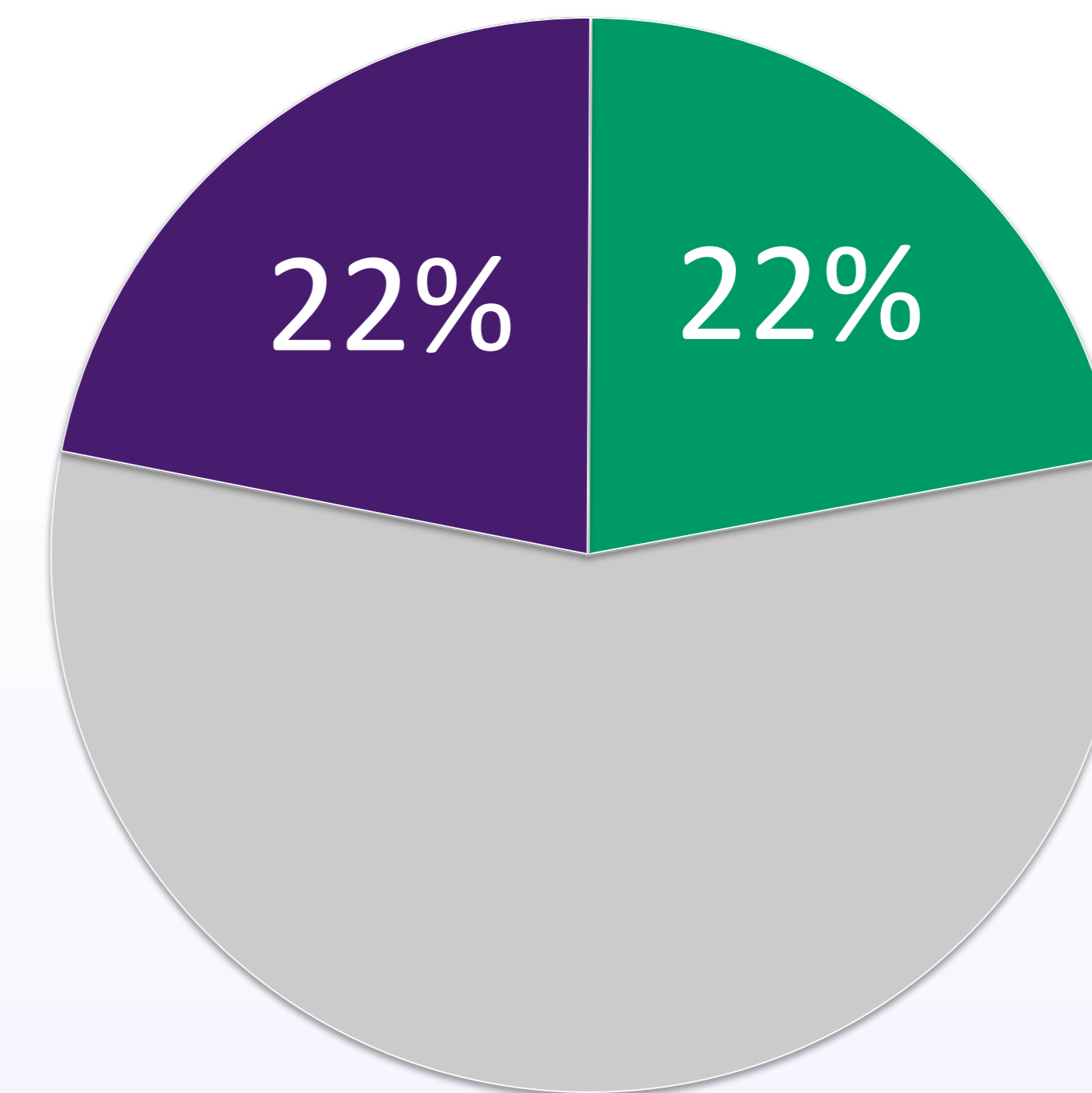
## Proportion of trips



## Proportion of nights



## Proportion of spend



Data relates to overnight trips only

Source: NISRA





## Marketing

**Spring campaign: 20th January – 30th March**

**Fermanagh in Ireland's Hidden Heartlands:  
February**

**400 media and influencer visits**

**New Discover Northern Ireland  
website**





## Marketing

**2 new RTÉ food series** with Neven Maguire and Catherine Fulvio

**Native media partnerships** with RTÉ, The Irish Times, Irish Independent, BT and Belfast Live





# Business Solutions

Fam trips for **450+ operators** across travel trade and business events throughout 2025

**UKInbound Discover Programme,**  
23rd – 25th February 2025

**Meet the Buyer, 27th – 28th March 2025**  
**5 x pre-event fam trips** across the North





# Business Solutions

**ITOA workshop, November 2025**

Location TBA

Supporting the delivery of **incentive, conference and business events**

Supporting our industry to attend **international trade and MICE events**, in collaboration with Tourism Ireland



# Business Supports 2025

**AI in Action  
webinar series**

**Make It Here**

**Sustainable Tourism  
Business Programme**

**Meet the  
Industry**

**Innovate  
Tourism**

**Employers Excellence  
Programme**

**Destination  
Customer Service**





# Experience Development 2025

Peace Tourism

America 250

Meet the  
Maker

Blueways and  
Greenways

Distillery Trail  
Development

Embrace a Giant Spirit  
Development Programme





# Destination Development

## Shared Island Programme

Roll-out of **new stewardship approach** to Destination Development

Dedicated support to accelerate the delivery of **signature City and Growth Deals**





# Destination Development

Multi-annual experience development programme for **new and enhanced visitor experiences** (subject to budget availability)

A **new role** in driving the development of visitor accommodation, following the transfer of functions from **Invest NI**





# **The 153rd Open Championship**

**Local business and community info session**

– 19th February, Portrush Town Hall

**Ready to Host The Open toolkit**

– 19th February

**Get Open Ready industry webinar**

– 25th February

**Customer Service Programme**

– 1st March – 30th June





# **The 153rd Open Championship**

**Industry engagement sessions, Belfast and Derry  
– April, May**

**Stay and Play campaigns, media and  
trade fairs, PR, social and digital**

**[TourismNI.com / 153rdOpen](https://www.tourismni.com/153rdOpen)**





**Supporting You**

**Alice Mansergh**  
Chief Executive





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

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

**Share your photos and stories**

**Join our overseas activities**

**Sign up for ezines and webinars**







**Teaming up together**



**Increase  
Value**



**Economies and  
Communities**



# Summary

**Inspiring  
Visitors**



**Strengthening  
Partnerships**



**Supporting  
You**







Tourism Ireland

**MARKETING PLANS 2025**

**Thank you**





Tourism Ireland

**MARKETING PLANS 2025**

**2025**