

# TOURISM IRELAND CORPORATE PLAN 2014 -2016

Approved by the NSMC 22<sup>nd</sup> January 2014

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## 1. Executive summary

Tourism is the largest indigenous industry on the island of Ireland and provides employment for about 240,000<sup>1</sup> people. It is estimated that more than 7.9 million<sup>2</sup> overseas visitors will come to the island of Ireland in 2013, with the tourism sector contributing more than €3.7/£3.2 billion<sup>3</sup> to the island of Ireland economies.

Focussed on helping to deliver ambitious targets for the island's tourism sector, this Corporate Plan has at its core seven key strategic trusts,

- 1. An entirely new focus on promotable revenue.** We will focus our energy and resources on increasing tourism revenue from promotable visitors.<sup>4</sup>
- 2. An ambitious target to win a greater share of European tourism revenues.** We are targeting +24% growth in revenue from promotable visitors delivering €7.6/£6.5 billion for the economies of the island of Ireland over the lifetime of the corporate plan.
- 3. A new investment approach that prioritises 'best prospect' revenue-generating markets.** This means a stronger focus on Mainland Europe and North America.
- 4. A new way of identifying target consumers who are most likely to visit the island of Ireland and presenting the most relevant holiday offering to them.** We will take a new global approach to consumer segmentation and brand architecture.
- 5. A new sales-focused strategy for Northern Ireland.** We are creating a dedicated strategy and fund to support a strengthened co-operative sales approach with the tourism industry at home and with overseas trade. This will be underpinned by a continued focus on access development and maximising positive PR opportunities.
- 6. A strong commitment to building global leadership in digital marketing.** We are taking a new digital approach to our marketing communications. We are targeting to grow the potential reach of our digital activity to more than 750 million social connections by 2016.
- 7. A shared vision for growth across agencies on the strategic priorities for tourism on the island of Ireland.** We will align our plans and work more closely with other agencies in both jurisdictions and with the industry on areas including product and experience development to ensure we appeal strongly to our best prospect consumers

Tourism Ireland is contributing to the development of the Tourism Policy Review and our strategy will be consistent with any recommendations arising from the review.

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<sup>1</sup> Central Statics Office (CSO) and Northern Ireland Statistics and Research Agency (NISRA)

<sup>2</sup> Oxford Economics – October 2013

<sup>3</sup> Oxford Economics – October 2013

<sup>4</sup> Promotable visitors are those who come to the island of Ireland for a holiday, English Language Training or for a conference and corporate incentive trip.

## 2. Tourism Ireland's goals, mission and vision

### Goals

Over the lifetime of this Corporate Plan, Tourism Ireland will continue to deliver on the following two goals:

- Increase tourism to the island of Ireland
- Support Northern Ireland to realise its tourism potential

### Vision

Our vision is to differentiate the island of Ireland on the world stage and promote all that it has to offer making it a 'must visit' destination, leading to the development of a dynamic and sustainable tourism sector.

### Mission

Tourism Ireland's mission for the period 2014 to 2016 will be to:

- Continue to grow overseas tourism to the island of Ireland
- Increase market share of international tourist arrivals and revenue
- Increase Northern Ireland's share of the island's growing tourism business

### Core focus

Our core focus will be to:

- Present the island of Ireland as truly compelling holiday destination
- Put Northern Ireland at the heart of our strategy and operational programmes
- Facilitate our trade and industry partners to "close the sale" thereby converting more prospective visitors into actual visitors
- In conjunction with industry, deliver increased promotable visitor revenue and numbers

Tourism Ireland's role is to be an economic catalyst, continuing to support the growth and development of one of the island of Ireland's most vital and high-potential sectors, which in turn helps to drive economic growth across both jurisdictions.

### 3. A review of performance against the 2011-13 Corporate Plan

At the end of the period of the 2011-2013 all core targets will have been exceeded with respect to the key metrics of overseas earnings, promotable visitor numbers and overseas visitors.

#### Corporate Plan 2011-13 Targets Vs. Forecasted Outturn

Metric	Corporate Plan Target Range for 2013	2013 Forecasted Outturn
Overseas revenue	Min €3.18/£2.61 billion – Max €3.42/£2.81 billion	€3.7/£3.2 billion
Promotable visitors	Min 3.12 million - Max 3.41 million	3.7 million
Overseas visitors	Min 7.21 million - Max 7.75 million	7.9 million

Over the course of the plan we undertook a comprehensive review of our marketing strategy in our core markets: Great Britain, the United States, Germany and France. The findings of these reviews are currently being implemented. In addition, Tourism Ireland delivered on all elements of strategy set out in the Corporate Plan for 2011 – 2013:

- **Developed a new approach to global consumer segmentation**
- **Targeted resources in markets which currently deliver significant promotable visitors** (particularly GB) to Northern Ireland.
- **Targeted the Diaspora** in all markets, but in particular in GB, North America and Australia. In our key markets we promoted The Gathering Ireland 2013 as a reason to visit in 2013. We have also targeted the Scots-Irish (Ulster-Scots) segment.
- **Refined the brand positioning** by implementing new brand architecture in 2013 and **deployed a new brand campaign** (Jump into Ireland).
- **Implemented integrated communications** by focusing on channels that deliver the highest levels of return on investment (based on Key Performance Indications and the results from the 2012 ROMI research).
- **Rolled out a new consumer website**
- **Built on the success of ni2012 and Titanic Belfast** and maximised our partner relationships and goodwill that has arisen from these initiatives.
- **Focused on Northern Ireland’s ground-breaking initiatives** such as **Derry~Londonderry UK City of Culture 2013** and the **World Police and Fire Games**.
- **Provided over 26,000 platforms and opportunities** to the industry and overseas trade to promote their offers directly to the consumer.
- **Invested €14.6/£11.9 million over 3 years in co-operative marketing activities** with key partners who have a proven track record of generating results.
- **Focused on access development and retention** by working with relevant Government agencies, departments, airports and carriers to help **restore lost access and exploit known access gaps**. The number of available one-way seats to the island of Ireland during the 2013 summer season grew by almost **12,000 per week** compared to the same period in 2010.

## 4. Outperforming our key competitors

The island of Ireland's tourism industry has performed well in recent years. Based on this strong foundation and with our new strategy in place, the target for the island of Ireland over the next three years will be for the industry to grow visitors by 3% points higher than that of the overall Western Europe tourism market.

During this period, sectorial growth of +24% in revenue from promotable visitors can be targeted, which will deliver €7.6/£6.5 billion for the economy of the island of Ireland and +15% growth in promotable visitors over the life of the plan.

**Island of Ireland Overseas Tourism Targets 2014 – 2016**

Island of Ireland	2012 Actual	2013 Forecast	2016 Targets	2016/13 CAGR	2016/13 % Change	W Europe 2016/13 % change
<b>Promotable Revenue (€ millions)</b>	<b>2,039</b>	<b>2,180</b>	<b>2,700</b>	<b>+7%</b>	<b>+24%</b>	<b>+18%</b>
<b>Promotable Revenue (£ millions)</b>	<b>1,753</b>	<b>1,875</b>	<b>2,322</b>	<b>+7%</b>	<b>+24%</b>	<b>+18%</b>
Visitors (000's)	7,430	7,908	8,872	+4%	+12%	+9%
Promotables (000's)	3,512	3,727	4,297	+5%	+15%	+8%
Revenue (€ millions)	3,442	3,679	4,497	+7%	+22%	+19%
Revenue (£ millions)	2,960	3,164	3,867	+7%	+22%	+19%

*Note: Please see Appendix 1 for additional detail*

### **Assumptions used when setting Tourism Ireland's Targets**

The following assumptions underlie the targets for 2014 – 2016:

- There will be a continued improvement in the global economy;
- The recovery in consumer confidence in key markets will be sustained;
- Employment levels in key markets will improve;
- There will be some further growth in air connectivity to the island from key markets in Europe and North America;
- There will be no overtly negative reporting of non-tourism events that could be perceived as damaging to the tourism industry;
- There will be no further, unplanned, cuts in Tourism Ireland resource;
- Travel and tourism will not be impacted by any external shocks such as a pandemic or volcanic eruption.

## 5. Strategic objectives, targets and activities for 2014 - 2016

The delivery of this ambitious plan will be underpinned by a step-change in collaboration between tourism agencies and partners, a ruthless focus on best prospect consumers, compelling destination

brand management, a new level of engagement with consumers overseas and an exploitation of the visitor potential of Northern Ireland. Each of these five platforms is supported by an integrated set of activities in our overseas markets. The following section of the plan details the strategic actions supporting each platform in each of the four overseas market areas.

Five strategic areas of focus will underpin the delivery of the stretching targets, given the assumptions detailed above:

1. **Focus Resources** – Targeting best-prospect market segments and making even better use of our resources
2. **Destination Brand** – Making the brand more distinctive and relevant, and encouraging the consumer to visit now
3. **Consumer Engagement** – Connecting with, engaging and influencing potential overseas visitors to consider the island of Ireland as their holiday destination
4. **Northern Ireland** – Maximising the tourism potential of Northern Ireland
5. **Collaboration** – Driving growth through partnership with other agencies and commercial partners

Specific objectives and measures for each of the five areas of focus will help us monitor delivery and these are outlined later in this plan.

Tourism Ireland is contributing to the development of the Tourism Policy Review and our strategy will be consistent with any recommendations arising from the review.

## 5.1 Focus Resources

<b>Strategic Objective</b>	Targeting best-prospect market segments and making even better use of our resources
<b>Targets for 2016</b>	<ol style="list-style-type: none"><li>1. Increase the island of Ireland Promotable Revenue by + 24% in 2016 v 2013.</li><li>2. Increase Ireland Promotable Revenue by + 23% in 2016 v 2013.</li><li>3. Increase Northern Ireland Promotable Revenue by + 36% in 2016 v 2013.</li><li>4. Increase the island of Ireland Promotable Visitors by +15% in 2016 v 2013.</li><li>5. Achieve an overall ROMI ratio of 23:1 in 2016</li></ol>
<b>Strategic Actions</b>	

As we plan for the next three years, we know that resources will be more constrained. We will maximise efficiency and make even better use of all of our resources.

### 1. Allocate resources based on the potential of each market and segment

We will link resource allocation to promotional revenue potential from both markets and segments. This approach will be based on a thorough assessment of potential return on investment. This will result in an increased focus on Mainland Europe and North America in particular. However, Tourism Ireland will continue its focus of driving growth from GB, in particular given its importance to the Northern Ireland industry.

### 2. Roll out motivation-based global segmentation

Our consumer segmentation strategy is based on identifying those motivations among key segments that the island of Ireland is well placed to satisfy. This new segmentation approach has brought much stronger focus to our operations in GB since it was rolled out for 2013. We are applying a similar segmentation model in the United States, Germany and France. Throughout the period of this Corporate Plan, this model will inform and guide our marketing decisions and activities, and will be rolled out across all markets.

### 3. Focus on high-potential niche segments

We will also target some high-potential niche segments, including the Diaspora, Business Tourism, English Language Training (ELT) and Golf. We will build on the legacy of the Gathering Ireland 2013 and to enhance our promotion of roots tourism to the Diaspora in GB, North America and Australia. We will work in collaboration with Fáilte Ireland and Northern Ireland Tourist Board (NITB) to agree strategic direction based on the resource made available to us by both agencies.

### 4. Focus on emerging markets

We will capitalise on improved access links from key long-haul markets and continue to develop strategic partnerships with airlines. As well as building the awareness of the island of Ireland as a holiday destination, we will further develop our relationship with the media and the travel trade,

and increase by +20% the number of overseas operators who sell the island of Ireland in Brazil, Russia, India and China (BRIC). We will also actively advocate for more liberalisation of visitor visas.

## 5.2 Destination Brand

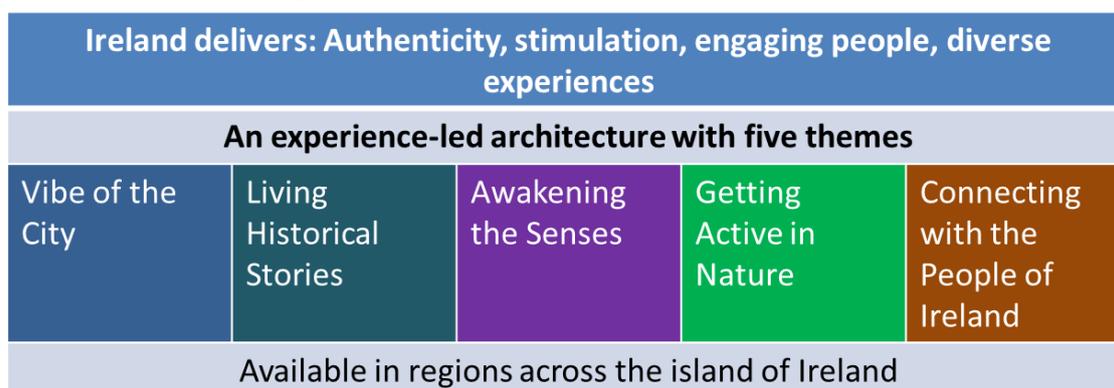
<b>Strategic Objective</b>	Making the brand more distinctive and relevant, thereby encouraging the consumer to visit now
<b>Targets for 2016</b>	<ol style="list-style-type: none"> <li>1. Maintain high interest ranking in GB, US and France while improve it in Germany</li> <li>2. Maintain high active planning ranking in GB, US and France while improve it in Germany</li> </ol>
<b>Strategic Actions</b>	

The island of Ireland brand must be clearly unique, and must make an emotional and relevant connection with our target segments.

### 1. Use our global brand architecture to underline the distinctiveness of our destination

Our brand architecture is a core asset of Tourism Ireland. It provides the basis for communicating the experiences we have to offer in a compelling way. It brings focus to our communications and enables us to connect with target consumers through relevant and targeted messaging. The refined architecture (shown in Figure 2 below) will be embedded in all of our activities.

**Figure 2: Destination Brand Ireland: Architecture**



This brand architecture model was developed and agreed in conjunction with Fáilte Ireland, NITB and the industry.

### 2. Focused and relevant brand communications

We will sharpen our focus on bringing our tourism offering to life to help potential visitors to imagine the kind of experiences they can have while on a holiday here. We will promote the iconic experiences that resonate most potently with our key segments. We will prioritise the communication of Wild Atlantic Way, Causeway Coastal Route, Dublin and adjoining counties, NI and Belfast iconic experiences that most resonate with our best prospect segments

### 3. Create a sense of urgency by giving compelling reasons to visit now

While the island of Ireland enjoys high levels of interest and intention to visit, our goal is to convert the consumer to visit now. To address this, we will:

- Give the tourism industry on the island of Ireland and the overseas trade more opportunities to close the sale, with a specific focus on developing additional online opportunities
- In line with the GB Path to Growth strategy, we will continue to implement the dedicated Northern Ireland programme in GB
- Identify key festivals and events that will motivate and influence potential holidaymakers to actually visit now. For 2014, these will include, the Giro d'Italia, North West 200, the Croke Park Classic American Football Game and the Limerick National City of Culture
- Seize opportunities to capitalise on topical film/TV series, books, celebrities, musicians, songs, and so on that allow us to talk about the island of Ireland
- Highlight the 'value for money' that is increasingly available

## 5.3 Consumer Engagement

<b>Strategic Objective</b>	Connecting with, engaging and influencing potential visitors overseas
<b>Targets for 2016</b>	<ol style="list-style-type: none"><li>1. Achieve 750 million social connections by end of 2016</li><li>2. Generate over €750/£645 million in equivalent advertising value from publicity for island of Ireland by the end of 2016.</li></ol>
<b>Strategic Actions</b>	

Consumer attention is being increasingly fragmented by the huge growth in the number of media. Our challenge is to deliver standout marketing messages that capture the attention of our target audiences. For that to happen, we need our communications to stand out even more successfully and we need to deepen the audiences' engagement with the messages we communicate. We also need to stimulate audiences to talk to others about the island of Ireland in order to broaden our reach.

### 1. Grow our own audiences

We will continue to invest in building our audiences in order to talk directly to them about holidaying on the island of Ireland. We now have more than 1.8 million followers on our social media platforms. Through them, we have the potential to reach a further 350 million of their connections. By 2016, we will grow this reachable audience to more than 750 million social connections.

### 2. Make our message contagious

We will seek to generate word-of-mouth recommendations and advocacy through our communications. We will:

- Create campaigns that are sharable and build communities around our digital platforms so that conversations will take place on Ireland.com in addition to third party social media sites.
- Encourage visitors who are enjoying their holiday on the island to advocate for us on their social networks
- Ensure all communications deliver relevant 'must go now' messages to our primary segments, while maximizing efficient integration of central campaigns/content including Wild Atlantic Way, Causeway Coastal Route, Titanic, Giro d' Italia and Limerick City of Culture 2014

### 3. Be more relevant

We will engage with the interests and passions of our audiences with increasing coverage on topics such as genealogy, food, cycling, golf and the Titanic. We will also increasingly target our communications to potential visitors at different stages in their holiday decision-making process so that, with the right messages, we can move them on to the next stage of consideration or planning.

#### **4. Be more nimble**

We will capitalise on good news stories concerning the island of Ireland whenever they arise by publicising them widely through our digital media and publicity channels. Our communications will become more topical and timely, and we will highlight the cultural and sporting stories that help to generate interest in the island as they happen.

#### **5. Broaden the type of publicity we generate**

We will continue to broaden the type of publicity we seek to generate overseas beyond the traditional travel media. We will:

- Seek out opportunities to engage with news, sports and entertainment media
- Increase focus on digital channels
- Identify new ways to use PR to generate positive word of mouth

#### **6. Increase our focus on converting potential visitors to actual visitors**

We will help our industry and trade partners to close more sales by developing new digital marketing platforms for them. These new initiatives will include enabling partners to identify consumers who have visited Tourism Ireland's digital platforms and target them again when they are on third-party websites.

#### **7. Enhance our campaign effectiveness**

The data at our disposal will grow significantly as we invest more in digital activity. This will enable us to assess the effectiveness of our campaigns in new and more comprehensive ways. It will also give us fresh insight into the behaviour of our target consumers. We will put in place new ways to measure the success of our activity and will apply what we have learned to the development of future campaigns.

#### **8. Build on our digital leadership**

We currently have the second largest number of Facebook fans of any national tourist board in the world and consistently perform well across social media platforms. To retain and enhance that leadership position for the island of Ireland, we will continue to invest in the development and expansion of our websites, social media presence, email and content marketing.

## 5.4 Northern Ireland

### Strategic Objective

Maximising the tourism potential of Northern Ireland

### Targets for 2016

1. Increase NI Promotable Revenue by + 36% in 2016 v 2013
2. Grow NI share of total promotable revenue from 9.1% in 2013 to 10.1% in 2016
3. Increase NI Promotable Visitors by +27% in 2016 v 2013.
4. Generate over €250/£215 million in equivalent advertising value from publicity for Northern Ireland by the end of 2016
5. Present 750 opportunities to industry in Northern Ireland and overseas trade partners that give at least 45,000 opportunities to engage by the end of 2016
6. Increase by 25% the number Tour Operators which will include Northern Ireland in their itineraries by the end of 2016

### Strategic Actions

Northern Ireland's recent performance has shown promise. Promotable visitors will have grown by +15% over the period of the Corporate Plan 2011-2013. The 'GB Path to Growth' strategy and resulting operating plans clearly addresses the issue of GB decline and we are optimistic that the performance can and will be turned around.

During 2014-16, Tourism Ireland in collaboration with the industry is targeting accelerated growth in promotable revenue of +36%.

#### 1. Build and make the most of access

We will intensify activity in markets with direct air and sea access to Northern Ireland. At the same time, we will identify and work with relevant carriers, airports, agencies and government to develop new inbound routes. Priority routes include stronger air links with GB and from key cities in markets including Canada, Germany and France. If all of the list of routes were realised, Tourism Ireland would invest up to an additional €2/£1.6 million over the life of the plan in co-operative marketing funds with carriers leveraging a further €2/£1.6 million in match funding. We will also promote Dublin as a gateway to Northern Ireland and support sea carriers to promote car touring in Northern Ireland.

#### 2. Incentivise overseas trade to deliver growth

We will put in place a fund of up to €900,000/£740,000 over the lifetime of the plan for a dedicated growth initiative to incentivise high-potential overseas trade partners to accelerate growth in visitor numbers to Northern Ireland (on a ratio of 75%/25%). We will target and invest in programmes designed to deliver additional business and extra bed nights over and above the current levels.

### **3. Encourage greater engagement with trade and industry**

We will deliver travel trade training programmes overseas, supported by sales missions and other high-profile events to showcase Northern Ireland so as to encourage increased visits and tours to Northern Ireland by the overseas trade. We will provide up to 35,000 engagements in opportunities to the Northern Ireland industry and trade to promote to and connect with consumers, building awareness of Northern Ireland as a holiday destination and converting interest to travel. Finally in partnership with NITB, we will continue to encourage and support training, development and engagement programmes for the Northern Ireland industry.

### **4. Make the most of the power of 'NI Plc'**

The continuing success of Northern Ireland in the wider economy, sport and culture helps to underpin our tourism publicity programme. We will work with everyone possible to push the Northern Ireland Plc story overseas. Key partners will include Invest NI, local authorities, and other groups that are active and expert in overseas markets across commerce and culture. Our target is to generate over €250/£215 million in equivalent advertising value from publicity for Northern Ireland by the end of 2016.

### **5. Focus on best prospect markets and segments**

We will ensure the Northern Ireland holiday experience is prominent in all marketing activity. Our first priority remains the GB market to Northern Ireland. In addition to continuing to leverage Northern Ireland assets in GB, we will also focus on developing other high potential markets including US, Canada, Germany and France.

### **6. Focus on signature attractions and promote truly unique experiences**

We will focus our marketing communications on key signature attractions, including Titanic Belfast and the Giant's Causeway. We will also promote truly unique experiences, including Giro d'Italia, the 'Game of Thrones', the Belfast music scene and the great outdoors, including the Fermanagh Lakes and the Mourne.

### **7. Highlight shoulder opportunities**

To attract more visitors throughout the year, we will increase our tactical and shoulder/off-season promotions with the overseas travel trade. In GB we target potential visitors to come Belfast and Derry~Londonderry for city breaks and for spring and autumn festivals during the shoulder periods.

## 5.5 Collaboration

### Strategic Objective

Driving growth through partnership with other agencies and commercial partners

### Targets for 2016

1. Provide up to 2.5 million digital referrals by end of 2016
2. Present 750 opportunities to island of Ireland industry and overseas trade partners that give at least 45,000 opportunities to engage by the end of 2016.
3. Generate €18/£16 million partner investment in partner-led (industry, trade or carrier) co-operative marketing campaigns by the end of '16

### Strategic Actions

It is critical to the success of the plan that we align our strategic priorities with our key partners. In developing this plan, we have identified specific work streams with our sister agencies, Fáilte Ireland and the NITB, on which we can engage.

#### 1) Working with Fáilte Ireland

- Deliver joint research (market intelligence) projects to generate insights and guide strategic decisions (while also being more resource efficient)
- Build on our shared view of priority consumer segments and markets to drive product and experience development and ensure the priorities are reflected in our joint programmes for overseas media and trade familiarisation
- Integrate and share digital know-how, and work towards increasing the industries digital capability
- Jointly evolve trade and industry engagement programmes in Ireland and overseas to improve sales

#### 2) Working with NITB

- Support the strengthening of Northern Ireland industry capabilities and connections with overseas trade
- Create a shared events promotional strategy and support the development of events that will resonate with consumers overseas
- Develop and deliver joint research (market intelligence) projects, which will generate insights and guide strategic decisions
- Integrate and share digital know-how, and work towards increasing the industries digital capability
- Build on our shared view of priority consumer segments and markets.
- Ensure efficient and effective design and deployment of content and digital assets

#### 3) Access partners

- Continue to concentrate resources on strategically important air and sea routes from markets that deliver the greatest promotable visitor revenue, through investment in co-operative marketing and enhanced market intelligence exchange

- Engage with airports and invest in making the case for the establishment of new, strategically important routes (including routes from high potential cities such as Bordeaux and Frankfurt to Northern Ireland), to increase promotable revenue and to deliver direct access to all parts of the island
- Seek to increase visitor revenue in the shoulder and off season by aligning Tourism Ireland’s marketing activities with carrier promotional programmes, using co-operative campaigns to extend the season

#### 4) Commercial partners

- Prioritise our co-operative marketing support with online and offline travel trade partners, based on their capacity to drive growth and to deliver promotable revenue incomes from priority markets
- Provide new promotional platforms for island of Ireland tourism partners to facilitate access to key segments so they can more effectively close the sale
- Prioritise promotional opportunities for those tourism industry partners with offerings that best match the needs of our priority segments
- Work with the trade and industry to drive repeat visits – visitors are typically highly satisfied by their holiday experiences on the island of Ireland. This gives us clear opportunities to expand and develop repeat visits. While ultimately the industry and trade will ‘convert’ potential visitors, Tourism Ireland will act as a catalyst providing market intelligence to identify where high potential for repeat visitors exists and providing marketing assistance, principally through digital support on communications.

#### 5) Other key stakeholders and partners

- Work to promote the island of Ireland with all agencies and state bodies in our priority markets. Collaborate on joint trade initiatives to enhance the image of the island of Ireland as a place to visit on holiday, invest or do business. These agencies include:
  - Bord Bia
  - Northern Ireland Connections
  - Cultural promotion agencies including film
  - Invest Northern Ireland
  - Enterprise Ireland
  - The IDA
  - Chambers of Commerce on the island of Ireland
- Build on the ‘enabler’ relationships developed as part of the Gathering Ireland 2013 and ni2012 to drive growth in business tourism. These relationships will be with organisations such as:
  - Irish associations and networks
  - International companies whose management have links to the island of Ireland
  - Large companies in the fast-moving consumer goods (FMCG) sector and organisations in the financial, electronics, technology, pharmaceutical and biotechnology industries that have a significant presence on the island of Ireland
- Work towards closer collaboration in marketing initiatives with Visit Britain in those long-haul markets where it makes commercial sense to do so.

## Summary of Tourism Ireland's Strategic Objectives, Targets and Actions for 2014 - 2016

	Strategic	Targets for 2016*	Strategic Actions
<b>Focus resources</b>	Targeting best-prospect market segments and making even better use of our resources	<ol style="list-style-type: none"> <li>1. Increase the island of Ireland Promotable Revenue by +24% in '16 v '13.</li> <li>2. Increase Ireland Promotable Revenue by +23% in '16 v '13.</li> <li>3. Increase Northern Ireland Promotable Revenue by +36% in '16 v '13.</li> <li>4. Increase the island of Ireland Promotable Visitors by +15% in '16 v '13.</li> <li>5. Achieve an overall ROMI ratio of 23:1 in 2016</li> </ol>	<ul style="list-style-type: none"> <li>• Allocate resources based on the potential of each market and segment</li> <li>• Roll out motivation-based global segmentation</li> <li>• Focus on high-potential niche segments</li> <li>• Focus on emerging markets</li> </ul>
<b>Destination Brand</b>	Making the brand more distinctive and relevant, and encouraging the	<ol style="list-style-type: none"> <li>1. Maintain high Interest Ranking in GB, US, France and improve it in Germany</li> <li>2. Maintain high Active Planning Ranking in GB, US and France and improve it in Germany</li> </ol>	<ul style="list-style-type: none"> <li>• Use our global brand architecture to underline the distinctiveness of our destination</li> <li>• Focused and relevant brand communications</li> <li>• Create a sense of urgency by giving compelling reasons to visit now</li> </ul>
<b>Consumer Engagement</b>	Connecting with, engaging and influencing potential overseas visitors	<ol style="list-style-type: none"> <li>1. Achieve 750 million Social Connections by the end of '16</li> <li>2. Generate over €750/£645 million in equivalent advertising value from publicity for island of Ireland by the end of 2016.</li> </ol>	<ul style="list-style-type: none"> <li>• Grow audiences &amp; enhance our campaign effectiveness</li> <li>• Use new marketing comms. &amp; build on our digital leadership</li> <li>• Make our message contagious, more relevant &amp; nimble</li> <li>• Broaden the type of publicity we generate</li> <li>• Focus on converting potential to actual visitors</li> </ul>
<b>Northern Ireland</b>	Maximising the tourism potential of Northern Ireland	<ol style="list-style-type: none"> <li>1. Increase NI Promotable Revenue by +36% in 2016 v 2013</li> <li>2. Grow NI share of total promotable revenue from 9.1% in '13 to 10.1% in '16</li> <li>3. Increase NI Promotable Visitors by +27% in '16 v '13.</li> <li>4. Generate over €250/£215 million in equivalent advertising value from publicity for Northern Ireland by the end of 2016</li> <li>5. Present 750 opportunities to industry in Northern Ireland and overseas trade partners that give at least 45,000 opportunities to engage by the end of 2016</li> <li>6. Increase by 25% the number Tour Operators which will include Northern Ireland in their itineraries by end of '16</li> </ol>	<ul style="list-style-type: none"> <li>• Build and make the most of access</li> <li>• Incentivise trade &amp; encourage more industry engagement</li> <li>• Make the most of the power of 'NI Plc'</li> <li>• Focus on best prospect markets, segments, signature attractions and unique experiences</li> </ul>
<b>Collaboration</b>	Driving growth through partnership with other agencies and commercial partners	<ol style="list-style-type: none"> <li>1. Generate 2.5 million referrals by end of 2016</li> <li>2. Present 750 opportunities to island of Ireland industry and overseas trade partners that give at least 45,000 opportunities to engage by the end of 2016.</li> <li>3. Generate €18/£16 million partner investment in partner-led (industry, trade or carrier) co-operative marketing campaigns by end of '16</li> </ol>	<p>Work with:</p> <ul style="list-style-type: none"> <li>• Commercial partners</li> <li>• Access partners</li> <li>• Fáilte Ireland &amp; NITB</li> <li>• Other key stakeholders and partners</li> </ul>

At our foundation: People, Culture, Governance, Support and Central Services

\* Targets are subject change. Targets will be confirmed once Tourism Ireland's budget for 2014-16 is confirmed and 2013 results are finalised

## 6. Aligning our resources for maximum efficiencies

<b>Strategic Objective</b>	Drive the delivery of Corporate Plan objectives by continuing to enable Tourism Ireland to be a high-performance organisation that fulfils our stakeholder and corporate governance requirements.
<b>Targets for 2016</b>	<ol style="list-style-type: none"><li>1. Deliver 4 per cent efficiency saving, which should cumulatively yield €14.508m/£12.477m in savings across 2014-2016, while recording a finance variance of no more than 1 percent for Tourism Ireland's core annual budget</li><li>2. Achieve full internal audit compliance by avoiding any 'Priority 1' risk grading in 2014-2016</li><li>3. Engage, develop and align our people in line with promotable revenue growth objectives</li></ol>
<b>Strategic Actions</b>	

In response to the significant challenges facing tourism, Tourism Ireland working with the industry will leverage all of its resources to achieve the revenue, visitor and promotable targets for the island of Ireland. This will require us to deploy our budgets, our people, and our systems and processes against the strategic priorities outlined.

### 1. Our funding

Tourism Ireland's reduced resources will be allocated to reflect the priorities for 2014 – 2016 and to support the additional effort required to achieve growth from our key source markets. We will use the available marketing funds to reach the best prospects in the most effective and efficient way.

### 2. Our people

We will invest in developing the intellectual capability of the organisation. Employee resources will be aligned on a priority basis to markets where maximum revenue is forecasted and to support departments to deliver the Corporate Plan Strategy.

We will nurture a learning culture, where all colleagues have access to learning, priority skills are enhanced and talent is cultivated. Tourism Ireland will continue to place significant emphasis on the development of organisational and individual ability. On an on-going basis this includes investment in people capabilities, management development, performance management and learning and development programmes aligned to business priorities. We will promote colleague engagement and motivation with a focus on wellbeing and work-life balance, ensuring that Tourism Ireland's values remain central to all our activities.

We will develop and evolve systems, policies and procedures as required providing on-going efficiencies in delivery. Finally, we will support internal communications and collaboration to deliver organisational priorities.

### **3. Our technology**

We will develop, implement and support technology platforms that enable the business to be effective, flexible and future-proofed, whilst seeking to deliver the highest levels of service to tourism. These platforms will equip staff with the correct tools to deliver the organisation's strategy and driving cost-savings wherever possible.

We will continue to develop the Business Continuity programme, optimise the benefits of the technology, use a business needs based IT development programme whilst ensuring the organisation is protected from ICT security related issues and meets all ICT Corporate Governance requirements.

### **4. Our input to product/experience strategy agenda**

We will continue to work with partner agencies and industry bodies to help inform, from an overseas perspective, the strategies for future development of product and experiences on the island of Ireland.

### **5. Our message to stakeholders**

The value of overseas tourism to the economies, North and South, is significant. The potential impact of the actions and decisions of a variety of bodies and agencies, as well as the roles played by individuals in enhancing the visitor experience is critical. Tourism Ireland will continue to engage in a comprehensive communications programme to reaffirm the economic importance of overseas tourism to Governments, industry stakeholders and to the general public.

We will continue to implement a comprehensive programme of media, industry and stakeholder communications in Ireland and Northern Ireland to highlight the economic contribution of tourism and demonstrate innovation, marketing effectiveness and return on investment. We will continue to strengthen existing relationships, and developing new ones, with Government stakeholders and others through a wide-ranging advocacy programme.

### **6. Our governance**

Tourism Ireland will continue to maintain the highest standards of corporate governance and deploy the resources available to deliver the maximum return on our investment. We will continue to seek synergies with partner agencies, Fáilte Ireland, Northern Ireland Tourist Board, as well as other Government bodies. We will continue to monitor Tourism Ireland's return on investment and marketing and organisational measures and deploy learning throughout Tourism Ireland's networks. Finally we will continue to deliver effective and efficient secretarial support to Tourism Ireland's Board and sub-committees.

## 7. 2014 – 2016 Budget

The table below is for illustrative purposes only. The table is based on a funding scenario which would deliver efficiency savings of 4%, 8% and 12% of the 2013 Business plan base, for the years 2014, 2015 and 2016 respectively. This being in line with the Finance Guidelines issued. The notes are an integral part of the interpretation of the illustrative table.

### Corporate Plan Core Budget 2014-16 (Euro)

	2013 Budget	2014 Forecast	2015 Forecast	2016 Forecast
	€'000	€'000	€'000	€'000
<b>Total Operating Costs</b>	<b>22,100</b>	<b>21,198</b>	<b>21,248</b>	<b>21,298</b>
Pay – Base Line	12,800	12,623	12,623	12,623
Operating	9,300	8,575	8,625	8,675
<b>Net TI Marketing Spend</b>	<b>38,346</b>	<b>36,831</b>	<b>34,362</b>	<b>31,894</b>
<b>TI Net Core Per Approved Business Plan</b>	<b>60,446</b>	<b>58,029</b>	<b>55,610</b>	<b>53,192</b>

	€'000	€'000	€'000	€'000
<b>Total Northern Ireland Executive Funding</b>	16,152	15,506	14,860	14,214
<b>Total Irish Government Funding</b>	44,294	42,523	40,750	38,978
<b>Grand Total Per Approved Business Plan</b>	<b>60,446</b>	<b>58,029</b>	<b>55,610</b>	<b>53,192</b>

The exchange rate for 2014 is €1.00=£0.86 (2013 €1.00=£0.82)

- Funding of £14.375m sterling was made available by the NI Executive in 2013. Taking account variations in exchange rates, funding of up to £13.800m will be made available in 2014 to meet the funding requirements set out in this plan, which reflects a 4% reduction in the 2013 allocation.**
- Irish Government funding in 2014 will be €42.523m, paid in Euros, which represents a 4% reduction on the actual amount provided in 2013 as approved by NSMC (€44.574m was included in the 2013 Business Plan).**
- The table above reflects core funding from both jurisdictions. However, in 2013, Tourism Ireland received €3.33m and €0.78m from the Irish Government and the Northern Ireland Executive for specific marketing initiatives in their respective jurisdictions.**

## Value for Money

Throughout 2013 Tourism Ireland has sought to, and consequently delivered, the required efficiency savings through better procurement and other efficiency programmes. This focus will continue over the course of 2014 – 2016. Continued and closer working with other agencies on shared services to drive greater efficiencies is planned.

The Sterling contribution is used primarily to fund Sterling denominated transactions and for some conversions to US dollars.

Appendix 3 gives further details regarding the proposed 2014 Budget and Indicative Allocations for 2015 & 2016, while Appendix 4 gives details of Tourism Ireland's Efficiency Savings Delivery Plan.

## 8. Monitoring and evaluating the plan

Based on the funding received we intend to account for our performance through formal measurement and evaluation. There will be two dimensions to measuring the impact of our plan:

1. Monitoring the deployment of the available resource optimally across the key target markets and audiences.
2. Evaluating our marketing programmes to ensure that they have the maximum impact.

Tourism Ireland proposes a range of core performance indicators (KPIs) to monitor the delivery of each strategic pillar of the Corporate Plan for 2014-16.

1. **Focus resources:** Grow promotable revenue and promotable visitors to the island of Ireland by +24% and +15% respectively by at the end of 2016.
2. **Destination brand:** Maintain the island of Ireland's high competitive interest ranking in GB, US and France and improve it in Germany and maintain the island of Ireland's high active planning ranking in GB, US and France and improve it in Germany in 2016 (as measured by the Tourism Ireland Brand Tracker Survey).
3. **Consumer engagement:** Achieve 750 million Social Connections by end of 2016
4. **Northern Ireland:** Grow promotable revenue and promotable visitors to Northern Ireland by +36% and +27% respectively by at the end of 2016.
5. **Collaboration:** Deliver 2.5 million commercial referrals to trade and industry from our digital activity.
6. **Organisation:** Drive the delivery of Corporate Plan objectives by continuing to enable Tourism Ireland to be a high-performance organisation that fulfils our stakeholder and corporate governance requirements. Specifically:
  - a. Deliver 4 per cent efficiency saving, which should cumulatively yield €14.508m/£12.477m in savings across 2014-2016, while recording a finance variance of no more than 1 percent for Tourism Ireland's core annual budget
  - b. Achieve full internal audit compliance by avoiding any 'Priority 1' risk grading in 2014-2016
  - c. Engage, develop and assign our people in line with promotable revenue growth objectives.

The full list of Tourism Ireland's Corporate KPI's are outlined in appendix 2

A Resource Allocation Model (RAM) will continue to be used to assess the allocation of marketing funds and resources, with financial and human resources targeting those markets with the potential to deliver maximum return.

Tourism Ireland intends to continue to monitor its Return on Marketing Investment (ROMI) to measure the return from each €/£ which the organisation invests in its overseas marketing activities in our key source markets of GB, US, France and Germany. This will ensure overseas marketing campaigns continue to be optimised with resources allocated toward those activities that provide the strongest return.

## **9. Communicating the plan**

While Tourism Ireland plays a pivotal role, we do not operate in isolation. If the island of Ireland is to compete, win and grow, the whole tourism system must work cohesively. Together with our partner agencies, the tourism industry on the island of Ireland and overseas trade, we can ensure that the island of Ireland prospers as a holiday destination.

We recognise that the success of this Corporate Plan is wholly dependent on continued partnership with the tourism industry and all of our stakeholders. We will launch this Corporate Plan in December 2013 and we will continue to communicate our annual business plans each year.

Tourism Ireland recognises that the objectives of this Corporate Plan can only be achieved through the buy in and the commitment of staff. We will communicate this plan to all staff, at all levels through already well-established existing forums of communication.

## Appendix 1

### Corporate Plan Targets

**NOTE EXCHANGE RATES 2013 – 2016 €1 = £0.86 GBP**

#### Island of Ireland Overseas Tourism Targets 2014 – 2016

Island of Ireland	2012 Actual	2013 Forecast	2016 Targets	2016/13 CAGR	2016/13 % Change
Promotable Revenue (€ millions)	2,039	2,180	2,700	+7%	+24%
Promotable Revenue (£ millions)	1,753	1,875	2,322	+7%	+24%
Visitors (000's)	7,430	7,908	8,872	+4%	+12%
Promotables (000's)	3,512	3,727	4,297	+5%	+15%
Revenue (€ millions)	3,442	3,679	4,497	+7%	+22%
Revenue (£ millions)	2,960	3,164	3,867	+7%	+22%

#### Ireland Targets 2014 – 2016

Ireland	2012 Actual	2013 Forecast	2016 Targets	2016/13 CAGR	2016/13 % Change
Promotable Revenue (€ millions)	1,859	1,981	2,429	+7%	+23%
Visitors (000's)	6,286	6,658	7,492	+4%	+13%
Promotables (000's)	3,281	3,474	3,957	+4%	+14%
Revenue (€ millions)	2,956	3,156	3,834	+7%	+21%

#### Northern Ireland Targets 2014 – 2016

Northern Ireland	2012 Actual	2013 Forecast	2016 Targets	2016/13 CAGR	2016/13 % Change
Promotable Revenue (£ millions)	155	171	233	+11%	+36%
Visitors (000's)	1,554	1,790	2,071	+5%	+16%
Promotables (000's)	489	522	663	+8%	+27%
Revenue (£ millions)	418	450	570	+8%	+27%

#### Overseas Visitor Targets 2014 – 2016

Visitors (000's)	2013 Forecast	2014 Target	2015 Target	2016 Target
Ireland	6,658	6,938	7,206	7,492
Northern Ireland	1,790	1,850	1,956	2,071
Island of Ireland	7,908	8,244	8,545	8,872
Great Britain	3,857	3,944	4,042	4,180
Mainland Europe	2,464	2,609	2,729	2,827
North America	1,112	1,196	1,256	1,318
Other Areas	475	495	519	546

### Overseas Visitor Targets 2014 – 2016

Visitors (% Growth)	%14/13	%15/14	%16/15	CAGR 16/13	%16/13
<b>Ireland</b>	<b>+4%</b>	<b>+4%</b>	<b>+4%</b>	<b>+4%</b>	<b>+13%</b>
<b>Northern Ireland</b>	<b>+3%</b>	<b>+6%</b>	<b>+6%</b>	<b>+5%</b>	<b>+16%</b>
<b>Island of Ireland</b>	<b>+4%</b>	<b>+4%</b>	<b>+4%</b>	<b>+4%</b>	<b>+12%</b>
Great Britain	+2%	+2%	+3%	+3%	+8%
Mainland Europe	+6%	+5%	+4%	+5%	+15%
North America	+8%	+5%	+5%	+6%	+18%
Other Areas	+4%	+5%	+5%	+5%	+15%

### Promotable Visitor Targets 2014 – 2016

Promotables (000's)	2013 Forecast	2014 Targets	2015 Targets	2016 Targets
<b>Ireland</b>	<b>3,474</b>	<b>3,659</b>	<b>3,804</b>	<b>3,957</b>
<b>Northern Ireland</b>	<b>522</b>	<b>557</b>	<b>602</b>	<b>663</b>
<b>Island of Ireland</b>	<b>3,727</b>	<b>3,919</b>	<b>4,097</b>	<b>4,297</b>
Great Britain	1,252	1,300	1,345	1,427
Mainland Europe	1,464	1,548	1,623	1,680
North America	747	796	839	885
Other Areas	264	275	291	305

### Promotable Visitor Targets 2014 – 2016

Promotables (% Growth)	%14/13	%15/14	%16/15	CAGR 16/13	%16/13
<b>Ireland</b>	<b>+5%</b>	<b>+4%</b>	<b>+4%</b>	<b>+4%</b>	<b>+14%</b>
<b>Northern Ireland</b>	<b>+7%</b>	<b>+8%</b>	<b>+10%</b>	<b>+8%</b>	<b>+27%</b>
<b>Island of Ireland</b>	<b>+5%</b>	<b>+5%</b>	<b>+5%</b>	<b>+5%</b>	<b>+15%</b>
Great Britain	+4%	+3%	+6%	+4%	+14%
Mainland Europe	+6%	+5%	+4%	+5%	+15%
North America	+7%	+5%	+6%	+6%	+19%
Other Areas	+4%	+6%	+5%	+5%	+15%

### Revenue Targets 2014 – 2016 (Euro)

Revenue (€ millions)	2013 Forecast (mn)	2016 Targets (mn)	CAGR 16/13	%16/13
<b>Ireland</b>	<b>3,156</b>	<b>3,834</b>	<b>+7%</b>	<b>+21%</b>
<b>Northern Ireland</b>	<b>523</b>	<b>663</b>	<b>+8%</b>	<b>+27%</b>
<b>Island of Ireland</b>	<b>3,679</b>	<b>4,497</b>	<b>+7%</b>	<b>+22%</b>
Great Britain	1,200	1,410	+6%	+17%
Mainland Europe	1,211	1,479	+7%	+22%
North America	881	1,121	+8%	+27%
Other Areas	387	488	+8%	+26%

### Revenue Targets 2014 – 2016 (Sterling)

Revenue (£ millions)	2013 Forecast	2016 Targets	CAGR 16/13	%16/13
<b>Ireland</b>	<b>2,714</b>	<b>3,297</b>	<b>+7%</b>	<b>+21%</b>
<b>Northern Ireland</b>	<b>450</b>	<b>570</b>	<b>+8%</b>	<b>+27%</b>
<b>Island of Ireland</b>	<b>3,164</b>	<b>3,867</b>	<b>+7%</b>	<b>+22%</b>
Great Britain	1,032	1,212	+6%	+17%
Mainland Europe	1,042	1,272	+7%	+22%
North America	758	964	+8%	+27%
Other Areas	333	419	+8%	+26%

### Promotable Revenue Targets 2014 – 2016 (Euro)

Revenue (€ millions)	2013 Forecast (mn)	2016 Targets (mn)	CAGR 16/13	%16/13
<b>Ireland</b>	<b>1,981</b>	<b>2,429</b>	<b>+7%</b>	<b>+23%</b>
<b>Northern Ireland</b>	<b>199</b>	<b>271</b>	<b>+11%</b>	<b>+36%</b>
<b>Island of Ireland</b>	<b>2,180</b>	<b>2,700</b>	<b>+7%</b>	<b>+24%</b>
Great Britain	462	551	+6%	+19%
Mainland Europe	798	972	+7%	+22%
North America	675	867	+9%	+28%
Other Areas	245	310	+8%	+26%

### Promotable Revenue Targets 2014 – 2016 (Sterling)

Revenue (£ millions)	2013 Forecast	2016 Targets	CAGR 16/13	%16/13
<b>Ireland</b>	<b>1,704</b>	<b>2,089</b>	<b>+7%</b>	<b>+23%</b>
<b>Northern Ireland</b>	<b>171</b>	<b>233</b>	<b>+11%</b>	<b>+36%</b>
<b>Island of Ireland</b>	<b>1,875</b>	<b>2,322</b>	<b>+7%</b>	<b>+24%</b>
Great Britain	398	474	+6%	+19%
Mainland Europe	686	835	+7%	+22%
North America	580	746	+9%	+28%
Other Areas	211	267	+8%	+26%

Please note that the outcomes tabulated here are consistent with the targets outlined in the Northern Ireland Programme for Government, the GB path to Growth, the Ireland Trade & Tourism Investment Strategy revenue targets and the ambition for Northern Ireland to achieve a growing share of visitors to the island

## Appendix 2

Tourism Ireland proposes a range of core performance indicators (KPIs) to monitor the delivery of each strategic pillar of the Corporate Plan for 2014-16.

Focus Resources	Increase the island of Ireland Promotable Revenue by + 24% in 2016 v 2013.	Annual KPI
	Increase Ireland Promotable Revenue by + 23% in 2016 v 2013.	Annual KPI
	Increase Northern Ireland Promotable Revenue by + 36% in 2016 v 2013.	Annual KPI
	Increase the island of Ireland Promotable Visitors by +15% in 2016 v 2013.	Annual KPI
	Achieve an overall ROMI ratio of 23:1 in 2016	Annual KPI
Destination Brand	Maintain high interest ranking in GB, US and France while improve it in Germany	Annual KPI
	Maintain high active planning ranking in GB, US and France while improve it in Germany	Annual KPI
Consumer Engagement	Achieve 750 million Social Connections by end of 2016	Quarterly KPI
	Generate over €750/£645 million in equivalent advertising value from publicity for island of Ireland by the end of 2016.	Quarterly KPI
Northern Ireland	Increase NI Promotable Revenue by +36% in 2016 v 2013	Annual KPI
	Grow NI share of total promotable revenue from 9.1% in '13 to 10.1% in '16	Annual KPI
	Increase NI Promotable Visitors by +27% in 2016 v 2013.	Annual KPI
	Generate over €250/ £215 million in equivalent advertising value from publicity for Northern Ireland by the end of 2016	Quarterly KPI
	Present 750 opportunities to industry in Northern Ireland and overseas trade partners that give at least 45,000 opportunities to engage by the end of 2016	Quarterly KPI
	Increase by 25% the number Tour Operators which will include Northern Ireland in their itineraries by the end of 2016	Quarterly KPI
Collaboration	Provide up to 2.5 million digital referrals by end of 2016	Quarterly KPI
	Present 750 opportunities to island of Ireland industry and overseas trade partners that give at least 45,000 opportunities to engage by the end of 2016.	Quarterly KPI
	Generate €18/£16 million partner investment in partner-led (industry, trade or carrier) co-operative marketing campaigns by end of 2016	Quarterly KPI
Aligning our resources for maximum efficiencies	Deliver 4 per cent efficiency saving, which should cumulatively yield €14.508m/£12.477m in savings across 2014-2016, while recording a finance variance of no more than 1 percent for Tourism Ireland's core annual budget	Annual KPI
	Achieve full internal audit compliance by avoiding any 'Priority 1' risk grading in '14-'16	Annual KPI
	Engage, develop and align our people in line with promotable revenue growth	Annual KPI

## Appendix 3

### Glossary

**Promotable Visitors** = Persons who are over 16 who visit the island of Ireland for a holiday, incentive trip, to go to a conference or for English language training.

**CSO** = Central Statistics Office

**NISRA** = Northern Ireland Statistical Research Agency

**BRIC countries** = Brazil, Russia, India and China

## Appendix 4

### Corporate Plan - Proposed 2014 Budget and Indicative Allocations for 2015 & 2016 in €000's

North South Body	Approved Budget 2013	Proposed Budget 2014				Indicative Budget 2015				Indicative Budget 2016			
		Total	Current	Capital	Total	% Change	Current	Capital	Total	% Change	Current	Capital	Total
€1 = £0.86 GBP													
Programme	38,346	36,831	0	36,831	-4%	34,362	0	34,362	-7%	31,894	0	31,894	-7%
<b>Total Programme Expenditure</b>	38,346	36,831	0	36,831	-4%	34,362	0	34,362	-7%	31,894	0	31,894	-7%
Pay Costs	12,300	11,723	0	11,723	-5%	11,723	0	11,723	0%	11,723	0	11,723	0%
Pension Costs	500	900	0	900	80%	900	0	900	0%	900	0	900	0%
Non Pay Administration Costs	9,300	8,575	0	8,575	-8%	8,625	0	8,625	1%	8,675	0	8,675	1%
<b>Total Administration Costs</b>	22,100	21,198	0	21,198	-4%	21,248	0	21,248	0%	21,298	0	21,298	0%
<b>Overall Total Expenditure (Programme &amp; Administration)</b>	60,446	58,029	0	58,029	-4%	55,610	0	55,610	-4%	53,192	0	53,192	-4%
Efficiency Savings identified in plans		2,418	0	2,418		4,836	0	4,836		7,254	0	7,254	
Proportion payable by NI representing X%	16,152	15,506		27%		14,860		27%		14,214		27%	
Proportion payable by IRL representing X%	44,294	42,523		73%		40,750		73%		38,978		73%	
Projected Staff Nos	154	148				148				148			

Narrative to support expenditure figures:

The above figures represent a 4%, 8% and 12% cut respectively, of the approved business plan amounts for 2013. No jurisdictional specific items are included in any of the years. Pensions have increased to reflect actual experience in 2013 and the expected retirements occurring in 2014.

## Appendix 5

### Business Plan - Proposed 2014 Budget Allocation in €000's

North South Body	Approved Budget 2013			Proposed Change +/-			Proposed Budget 2014		
	Current	Capital	Total	Current	Capital	Total	Current	Capital	Total
€1 = £0.86 GBP									
Programme	38,346	0	38,346	(1,516)	0	(1,516)	36,831	0	36,831
<b>Total Programme Expenditure</b>	38,346	0	38,346	(1,516)	0	(1,516)	36,831	0	36,831
Pay Costs	12,300	0	12,300	(577)	0	(577)	11,723		11,723
Pension Costs	500	0	500	400	0	400	900		900
Non Pay Administration Costs	9,300	0	9,300	(725)	0	(725)	8,575		8,575
<b>Total Administration Costs</b>	22,100	0	22,100	(902)	0	(902)	21,198	0	21,198
<b>Overall Total Expenditure (Programme &amp; Administration)</b>	60,446	0	60,446	(2,418)	0	(2,418)	58,029	0	58,029
Proportion payable by NI representing X%	16,152		27%	(646)		27%	15,506		27%
Proportion payable by IRL representing X%	44,294		73%	(1,772)		73%	42,523		73%
Existing/Projected Staff Numbers	154			148			148		

Narrative to support expenditure figures:

The above figures represent a 4% cut in the approved business plan amounts for 2013. No jurisdictional specific items are included in either of the years.

## Appendix 6

### NORTH/SOUTH BODY: Tourism Ireland Ltd

This Delivery Plan describes the measures Tourism Ireland will implement to achieve its target savings for 2014 – 2016.

#### Efficiency Programme

The Body will realise total efficiencies of **£', 000s / €', 000s** from 2014-2016 as shown in the Total Efficiency Table below

Sterling					Euro				
<b>Total Efficiency Targets (4% p.a., 12% cumulative)</b>	<b>Baseline &amp; Total Efficiencies</b>	<b>2014 Efficiency Savings</b>	<b>2015 Efficiency Savings (Cumulative)</b>	<b>2016 Efficiency Savings (Cumulative)</b>	<b>Total Efficiency Targets (4% p.a., 12% cumulative)</b>	<b>Baseline &amp; Total Efficiencies</b>	<b>2014 Efficiency Savings</b>	<b>2015 Efficiency Savings (Cumulative)</b>	<b>2016 Efficiency Savings (Cumulative)</b>
	£`000s	£`000s	£`000s	£`000s	€`000s	€`000s	€`000s	€`000s	€`000s
Baseline (2013 approved budget)	<b>51,984</b>				Baseline (2013 approved budget)	<b>60,446</b>			
Total Efficiencies Required	<b>12,476</b>	<b>2,079</b>	<b>4,159</b>	<b>6,238</b>	Total Efficiencies Required	<b>14,508</b>	<b>2,418</b>	<b>4,836</b>	<b>7,254</b>
Indicative Budget		<b>49,904</b>	<b>47,825</b>	<b>45,745</b>			<b>58,029</b>	<b>55,610</b>	<b>53,192</b>

The areas that have been targeted as a means of realising cash releasing efficiencies are summarised in the first column of the table below and the monitoring arrangements and measures that will be put in place to ensure efficiency savings are delivered without impacting on targets and service delivery are detailed in the final column.

EFFICIENCY PROGRAMME SUMMARY TABLE - exchange rate used throughout for planning purposes - €1 = £0.86

	Sterling	Euro		
	2014 Savings £'000s	2014 Savings €'000s	Responsible Officer	Monitoring arrangements / measures to ensure forecast level of savings are delivered without a detrimental impact on priority services.
(a) Admin	776	902	Market managers/ Senior Management Team/CEO.	Savings on the administration budget will be secured through the continued renegotiation of leases on Tourism Ireland's overseas office network. All staff travel is being monitored to ensure that only essential travel is undertaken and, in these cases, that the most cost efficient mode of transport is used. Video conferencing is being used whenever possible and the company is using Government owned buildings for meeting/conferences whenever feasible. Office services such as the purchase of newspapers and the use of couriers has been reduced. New contracts for web hosting and the provision of data lines have resulted in savings. Headcount has been reduced and will be reduced further. Individual Departmental managers will be responsible for reducing costs in their areas such as T&S. Monthly reports will be prepared for each main market manager to ensure that the reduced spending targets under various categories are being adhered to. A summary of these reports will be provided on a quarterly basis to the Senior Management team and the CEO.
(b) Resource	1,303	1,516	Market managers/ Senior Management Team/CEO.	In terms of the marketing budget, we will aim to continue to achieve better rates for the purchase of advertising space on the web, radio, television and print. The mix of marketing media will be reviewed on an on-going basis to ensure maximum effective exposure at the minimum cost. The Head of Marketing Communications is specifically monitoring the rates/prices received on advertising purchases and these are being compared against last year's rates and the advertising market rates generally. Monthly reports will be prepared for each main market manager to ensure that the reduced spending targets under various categories are being adhered to. A summary of these reports will be provided on a quarterly basis to the Senior Management team and the CEO.
<b>Total Savings</b>	<b>2,079</b>	<b>2,418</b>		
<b>Savings-NI contribution</b>	<b>556</b>	<b>646</b>		
<b>Savings-Irish contribution</b>	<b>1,523</b>	<b>1,772</b>		

The areas that have been targeted as a means of realising cash releasing efficiencies are summarised in the first column of the table below and the monitoring arrangements and measures that will be put in place to ensure efficiency savings are delivered without impacting on targets and service delivery are detailed in the final column.

EFFICIENCY PROGRAMME SUMMARY TABLE - exchange rate used throughout for planning purposes - €1 = £0.86

	Sterling	Euro		
	Indicative 2015 Savings £'000s	Indicative 2015 Savings €'000s	Responsible Officer	Monitoring arrangements / measures to ensure forecast level of savings are delivered without a detrimental impact on priority services.
<b>(a) Admin</b>	733	852	Market managers/ Senior Management Team/CEO.	Savings on the administration budget will be secured through the continued renegotiation of leases on Tourism Ireland's overseas office network. All staff travel is being monitored to ensure that only essential travel is undertaken and, in these cases, that the most cost efficient mode of transport is used. Video conferencing is being used whenever possible and the company is using Government owned buildings for meeting/conferences whenever feasible. Office services such as the purchase of newspapers and the use of couriers has been reduced. New contracts for web hosting and the provision of data lines have resulted in savings. Headcount has been reduced and will be reduced further. Individual Departmental managers will be responsible for reducing costs in their areas such as T&S. Monthly reports will be prepared for each main market manager to ensure that the reduced spending targets under various categories are being adhered to. A summary of these reports will be provided on a quarterly basis to the Senior Management team and the CEO.
<b>(b) Resource</b>	3,426	3,984	Market managers/ Senior Management Team/CEO.	In terms of the marketing budget, we will aim to continue to achieve better rates for the purchase of advertising space on the web, radio, television and print. The mix of marketing media will be reviewed on an on-going basis to ensure maximum effective exposure at the minimum cost. The Head of Marketing Communications is specifically monitoring the rates/prices received on advertising purchases and these are being compared against last year's rates and the advertising market rates generally. Monthly reports will be prepared for each main market manager to ensure that the reduced spending targets under various categories are being adhered to. A summary of these reports will be provided on a quarterly basis to the Senior Management team and the CEO.
<b>Total Savings</b>	<b>4,159</b>	<b>4,836</b>		
<b>Savings-NI contribution</b>	<b>1,111</b>	<b>1,292</b>		
<b>Savings-Irish contribution</b>	<b>3,048</b>	<b>3,544</b>		

The areas that have been targeted as a means of realising cash releasing efficiencies are summarised in the first column of the table below and the monitoring arrangements and measures that will be put in place to ensure efficiency savings are delivered without impacting on targets and service delivery are detailed in the final column.

EFFICIENCY PROGRAMME SUMMARY TABLE - exchange rate used throughout for planning purposes - €1 = £0.86

	Sterling	Euro		
	Indicative 2016 Savings £`000s	Indicative 2016 Savings €`000s	Responsible Officer	Monitoring arrangements / measures to ensure forecast level of savings are delivered without a detrimental impact on priority services.
<b>(a) Admin</b>	690	802	Market managers/ Senior Management Team/CEO.	Savings on the administration budget will be secured through the continued renegotiation of leases on Tourism Ireland's overseas office network. All staff travel is being monitored to ensure that only essential travel is undertaken and, in these cases, that the most cost efficient mode of transport is used. Video conferencing is being used whenever possible and the company is using Government owned buildings for meeting/conferences whenever feasible. Office services such as the purchase of newspapers and the use of couriers has been reduced. New contracts for web hosting and the provision of data lines have resulted in savings. Headcount has been reduced and will be reduced further. Individual Departmental managers will be responsible for reducing costs in their areas such as T&S. Monthly reports will be prepared for each main market manager to ensure that the reduced spending targets under various categories are being adhered to. A summary of these reports will be provided on a quarterly basis to the Senior Management team and the CEO.
<b>(b) Resource</b>	5,548	6,452	Market managers/ Senior Management Team/CEO.	In terms of the marketing budget, we will aim to continue to achieve better rates for the purchase of advertising space on the web, radio, television and print. The mix of marketing media will be reviewed on an on-going basis to ensure maximum effective exposure at the minimum cost. The Head of Marketing Communications is specifically monitoring the rates/prices received on advertising purchases and these are being compared against last year's rates and the advertising market rates generally. Monthly reports will be prepared for each main market manager to ensure that the reduced spending targets under various categories are being adhered to. A summary of these reports will be provided on a quarterly basis to the Senior Management team and the CEO.
<b>Total Savings</b>	<b>6,238</b>	<b>7,254</b>		
<b>Savings-NI contribution</b>	<b>1,667</b>	<b>1,939</b>		
<b>Savings-Irish contribution</b>	<b>4,571</b>	<b>5,315</b>		

The areas that have been targeted as a means of realising cash releasing efficiencies are summarised in the first column of the table below and the monitoring arrangements and measures that will be put in place to ensure efficiency savings are delivered without impacting on targets and service delivery are detailed in the final column.

## DETAILS FOR NORTHERN IRELAND BUDGET REQUIREMENTS

NI sponsor departments are required to provide some additional budgetary information on North South Bodies. The following table is required to complement the North South Bodies Budgetary information contained within the Business Plan Budgets. This information ensures that the full Budget costs to their departments are approved by Northern Ireland Executive Ministers.

### *SPECIFIC REPORTING REQUIREMENTS FOR NI BUDGETS in £000's*

	2014			2015			2016		
	Current	Capital	Total	Current	Capital	Total	Current	Capital	Total
<b><i>Northern Ireland Non Cash Costs</i></b>	325	0	325	325	0	325	325	0	325
<b><i>Northern Ireland AME Costs</i></b>	405	0	405	405	0	405	405	0	405

Northern Ireland Non Cash Costs - These comprise the estimated NI share of the FRS17 current pension service costs based on the actual 2012 figures, as provided by the pension scheme administrators, Xafinity Consulting.

Northern Ireland AME Costs - These costs comprise the estimated NI share of 'other finance costs' in respect of the pension scheme, and are based on actual 2012 calendar year figures, as provided by the pension scheme administrators, Xafinity Consulting

NI Sponsor departments must complete this Annex in conjunction with their North South Bodies and must include this annex in any submission to Northern Ireland Executive Ministers to ensure that Ministers are aware of, and approve the full budget implications.