Tourism Ireland

Marketing Plans 2023



KAREN PATTERSON


#TI2023

CHRISTOPHER BROOKE

Chairman

NIALL GIBBONS

Chief Executive

RECOVERY FRAMEWORK



RECOVERY FRAMEWORK

RESTART REBUILD REDESIGN



GLOBAL TOURISM

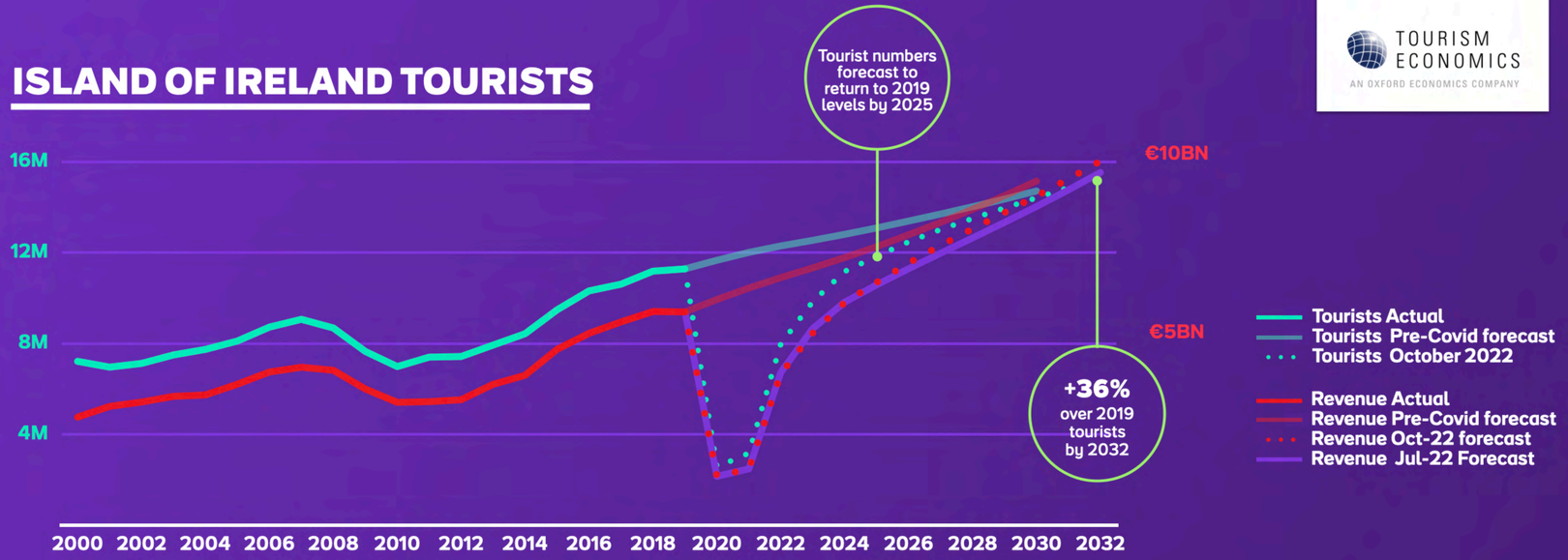
GLOBAL TOURISM





ISLAND OF IRELAND TOURISTS

ISLAND OF IRELAND TOURISTS



TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

2022



Outturn:

75%

of 2019 business

2022

YEAR OF RESTART



2022 HIGHLIGHTS







RESEARCH PROGRAMME 2022

10 Key Revenue Markets



RESEARCH PROGRAMME 2022

10th wave

10 Key Revenue Markets

- Great Britain
- USA
- Germany
- France
- Spain
- Italy
- Canada
- The Netherlands
- Denmark
- Switzerland

In-depth Research Top 4



RESEARCH PROGRAMME

Key Findings



RESEARCH PROGRAMME

Key Findings

- Desire to travel stronger than ever
- Cost of living concerns greatest risk to travel
- Many still planning for 2023 — Opportunity to influence

CONTEXT



CONTEXT

- 10 years of growth
- COVID-19
- Geopolitical unrest
- Sustainability





OUR AMBITION



OUR AMBITION

- **Rebuild holidaymaker revenue to pre-pandemic levels**
- **Focus on attracting value-adding tourists**



CHALLENGES



CHALLENGES

- UK ETA
- Cost of doing business
- War in Ukraine
- Labour shortfalls
- Currency fluctuations
- Competitive landscape

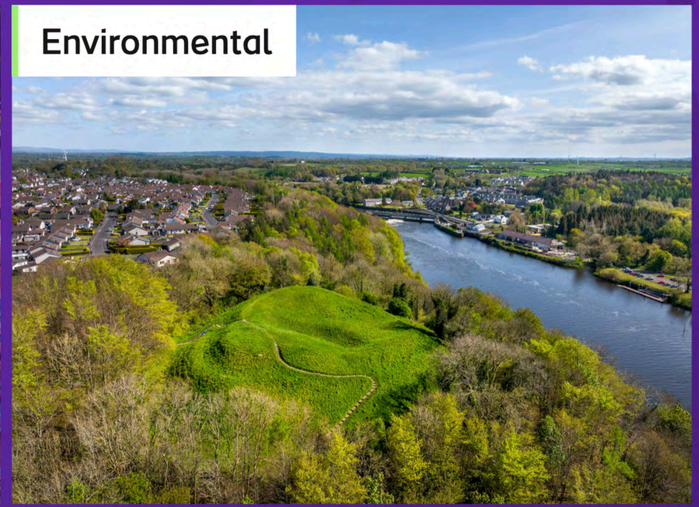
Agility and Flexibility: **'Always On'**

BUILDING BLOCKS FOR SUCCESS

BUILDING BLOCKS FOR SUCCESS







SUSTAINABILITY

Embed sustainability in consumer, trade and media activity



SUSTAINABILITY

Embed sustainability in consumer, trade and media activity

- Increase focus in publicity and digital marketing
- Increase focus in trade and media visits
- Sales opportunities





TARGET MARKETS

Focus on markets that deliver greatest revenue



TARGET MARKETS

Focus on markets that deliver greatest revenue

- North America
- Great Britain
- Mainland Europe

Segmentation Research



CREATING DEMAND TO DELIVER



CREATING DEMAND TO DELIVER

- Holidaymaker revenue growth
- Extension to holiday season
- Greater focus on minimising environmental impacts
- Positive impact on communities

SIOBHÁN McMANAMY

Director of Markets



2023

YEAR OF REBUILD

2023 MARKETING EXPENDITURE





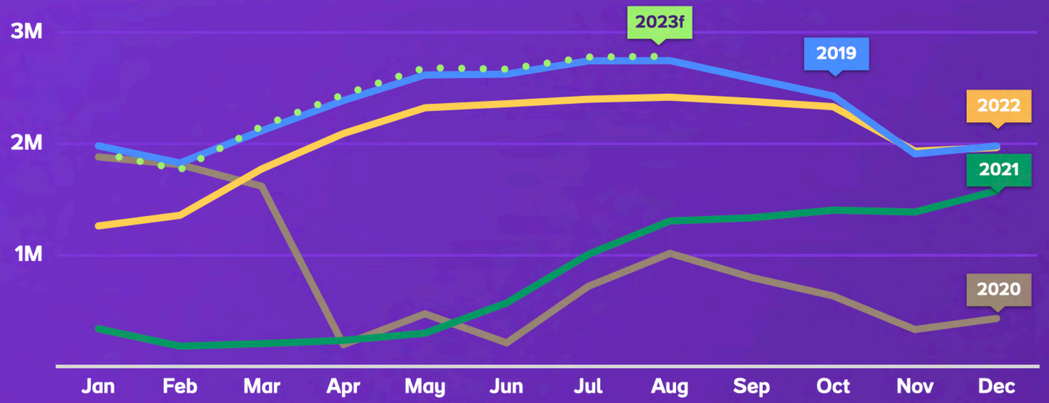
2023 MARKETING EXPENDITURE

£70m

£22m
on 2019

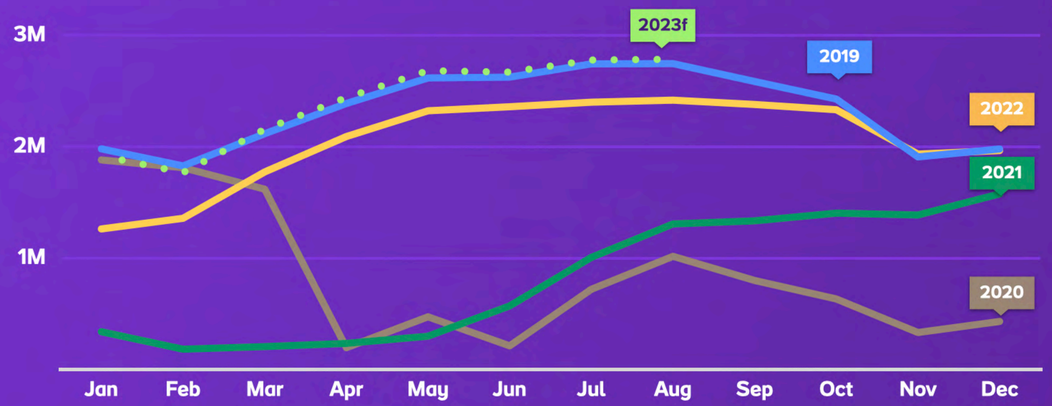
ACCESS OUTLOOK FOR SUMMER 2023

ACCESS OUTLOOK FOR SUMMER 2023



June 2023
NI air capacity
104%
of June 2019

ACCESS OUTLOOK FOR SUMMER 2023



June 2023
NI air capacity
104%
of June 2019

NEW ROUTES

Lufthansa	Frankfurt – Belfast
Ryanair	Paris – Belfast
Ryanair	Milan Bergamo – Belfast
Ryanair	London Stansted – Belfast
Ryanair	Manchester – Belfast
Ryanair	East Midlands – Belfast
Ryanair	Edinburgh – Belfast
Ryanair	Girona – Belfast
Ryanair	Cardiff – Belfast
Eastern Airways	Southampton – Belfast
Emerald Airlines	Newquay Cornwall – Belfast

NI EMBRACE A GIANT SPIRIT CAMPAIGNS

NI EMBRACE A GIANT SPIRIT

£5m



2023

Spring

France

Découvrez Belfast.
Cliquez sur le bouton vert

RÉSERVEZ VOTRE VOL + HÔTEL DÈS 175 €

cheap Tickets.nl

Noord-Ierland

Italy

P&O FERRIES

NEW GLOBAL CAMPAIGN

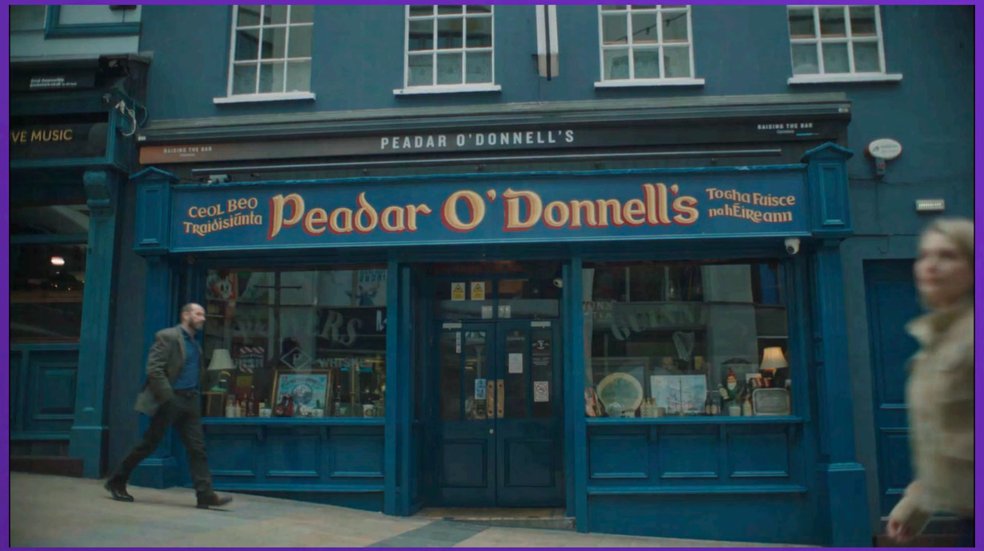
A celebration of **WHAT FILLS YOUR HEART WITH IRELAND**

March

17th



NEW GLOBAL CAMPAIGN




PEADAR O'DONNELL'S
Ceol Beo Traidisiúnta
Peadar O'Donnell's
Tógha Fáisce nahÉireann

NEW GLOBAL CAMPAIGN

March

17th

Top 4 Markets

NEW GLOBAL CAMPAIGN

March

17th

Top 4 Markets

- TV
- Media partnerships
- Multiple bursts of digital



NEW GLOBAL CAMPAIGN

March

17th

Top 4 Markets

- TV
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9 other Markets

- Digital
- Outdoor
- Radio

NEW GLOBAL CAMPAIGN

March

17th

Top 4 Markets

- TV
- Media partnerships
- Multiple bursts of digital

9 other Markets

- Digital
- Outdoor
- Radio

- ✓ Right Message
- ✓ Right Time
- ✓ Right Channel

SUPPORTING CAMPAIGNS

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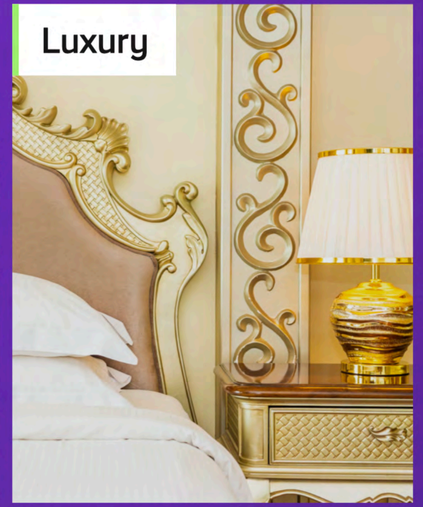
St Patrick's Day



Halloween



Luxury



Activities and Adventure



The Open and Ryder Cup



SUPPORTING CAMPAIGNS

St Patrick's Day

Hallov



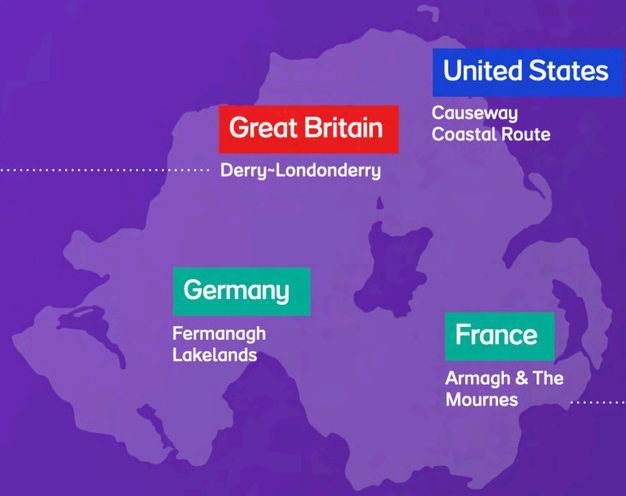
The Open and Ryder Cup

TWINNING PARTNERSHIPS



TWINNING PARTNERSHIPS







TWINNING PARTNERSHIPS



DONEGAL &

MARKET OPPORTUNITIES

MARKET OPPORTUNITIES

Good Vibrations



Sports Tourism



Notre Dame v Navy



Riverdance



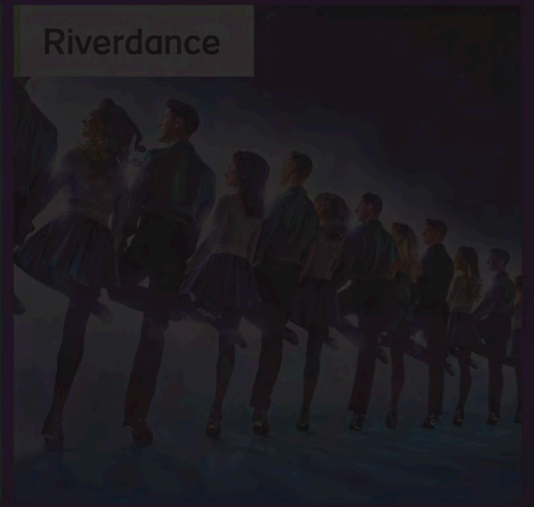
MARKET OPPORTUNITIES



Good Vibrations



Riverdance





BELFAST UNESCO CITY OF MUSIC

BELFAST UNESCO CITY OF MUSIC








SOUND ADVICE
BELFAST


HOMECOMING
THE ROAD TO MULLINGAR
WITH LEWIS CAPALDI


TITANIC BELFAST

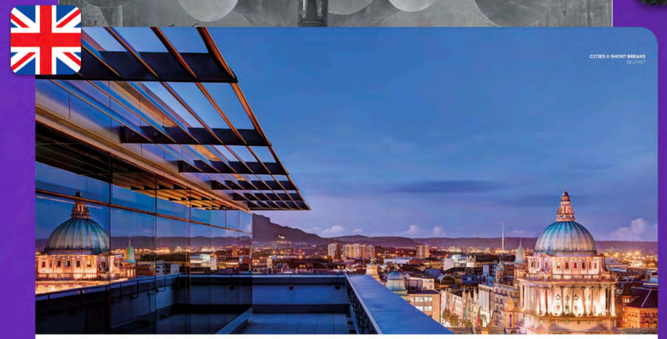


OVERSEAS PUBLICITY

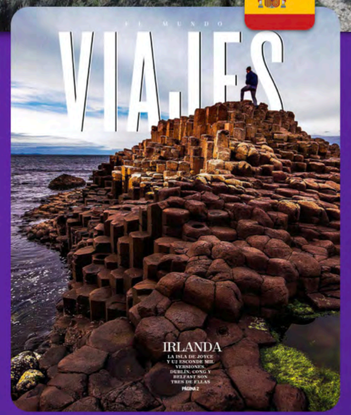
OVERSEAS PUBLICITY

Reach
530m
(2022)











EAV
£185m
(2022)

increased activity with influencers

PROGRAMMING



PROGRAMMING

3-year

TV programming fund











7,000+
Broadcasts

PROGRAMMING

3-year

TV programming fund



7,000+

Broadcasts

SCREEN TOURISM

SCREEN TOURISM

Derry Girls



Dungeons & Dragons: Honor Among Thieves



Vikings Valhalla

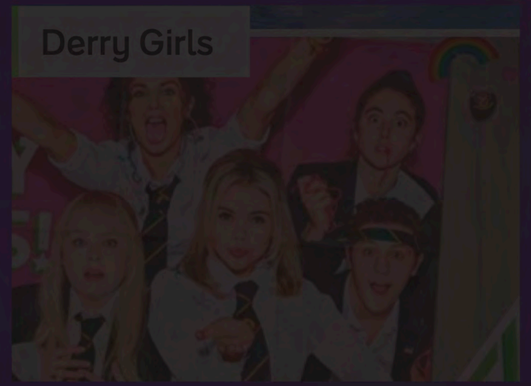


The Banshees of Inisherin



SCREEN TOURISM

Derry Girls





The Banshees of Inisherin



DIGITAL FOOTPRINT

DIGITAL FOOTPRINT

348m
Engagements
(completed video views, clicks, other engagements)

2.872bn
Opportunities to see
(digital ad impressions)

6m
Social Media Followers

12.2m
Visits to Ireland.com

1.1m
Email Subscribers



DIGITAL FOOTPRINT

348m
Engagements
(completed video views, clicks, other engagements)

1.1m
Email Subscribers



GREAT BRITAIN KEY MOMENTS



GREAT BRITAIN KEY MOMENTS

Jan-Feb	**Kickstart campaign** **Celtic Connections** **NI Embrace a Giant Spirit campaign**
Mar-May	**Fill your heart with Ireland** burst 1 **BTTS**
Jun-Aug	**'Always On'** **Royal Highland Show**
Sep	**Fill your heart with Ireland** burst 2 **BMW PGA Championship**
Oct-Dec	**Fill your heart with Ireland** burst 3 **World Travel Market** **Classic Motor Show** **Ireland Meets the West End**



UNITED STATES KEY MOMENTS



UNITED STATES KEY MOMENTS

Jan-Feb	Kickstart campaign Diaspora campaign PGA Show Sales mission – west coast Airline and tour operator co-op Belfast City of Music Roadshow
Mar-May	Fill your heart with Ireland burst 1 Sales mission – east coast Riverdance sponsorship Travel Classics Intl. Conference Golf campaign
Jun-Aug	'Always On' Aer Lingus College Football Classic Virtuoso Travel Mart
Sep	Fill your heart with Ireland burst 2 Diaspora campaign
Oct-Dec	Luxury Summit Fill your heart with Ireland burst 3

GERMANY KEY MOMENTS



GERMANY KEY MOMENTS

Jan	Kickstart campaign CMT Stuttgart
Feb-Mar	NI Embrace a Giant Spirit campaign Riverdance ITB Berlin Galeria partnership Fill your heart with Ireland burst 1
Apr-May	Kerrygold 50
Jun-Aug	'Always On'
Sep	Fill your heart with Ireland burst 2
Oct	DRV fam and workshop Halloween Ireland Meets Germany

FRANCE KEY MOMENTS



FRANCE KEY MOMENTS

Feb	**Kickstart campaign** **NI Embrace a Giant Spirit campaign**
Mar-Apr	**Fill your heart with Ireland** burst 1
May-Aug	**'Always On'**
Sep	**Fill your heart with Ireland** burst 2 **Rugby World Cup** **IFTM** **Festival Interceltique de Lorient**
Nov	**Fill your heart with Ireland** burst 3






WALLED CITY BREWERY






HINCH
DISTILLERY CO













TRAVEL TRADE

ETOA

CTA
COACH TOURISM ASSOCIATION

UKINBOUND
THE VOICE OF INBOUND TOURISM



Ireland

Middle East Sales Mission 2022
Ireland

#GreenButton

Tourism Ireland

Irlande
Irlande


A Touch of Ireland
Irlande

TOURISM IRELAND
M19
ITB ASIA
TOURISM IRELAND

WELCOME!
PGA SHOW
PGA SHOW

Ireland

Ireland
Irelan


IMAP
Ireland
Middle East Sales Mission 2022
#GreenButton
Tourism Ireland
Irlande
PGA SHOW
A Touch of Ireland

NEW GLOBAL CAMPAIGN



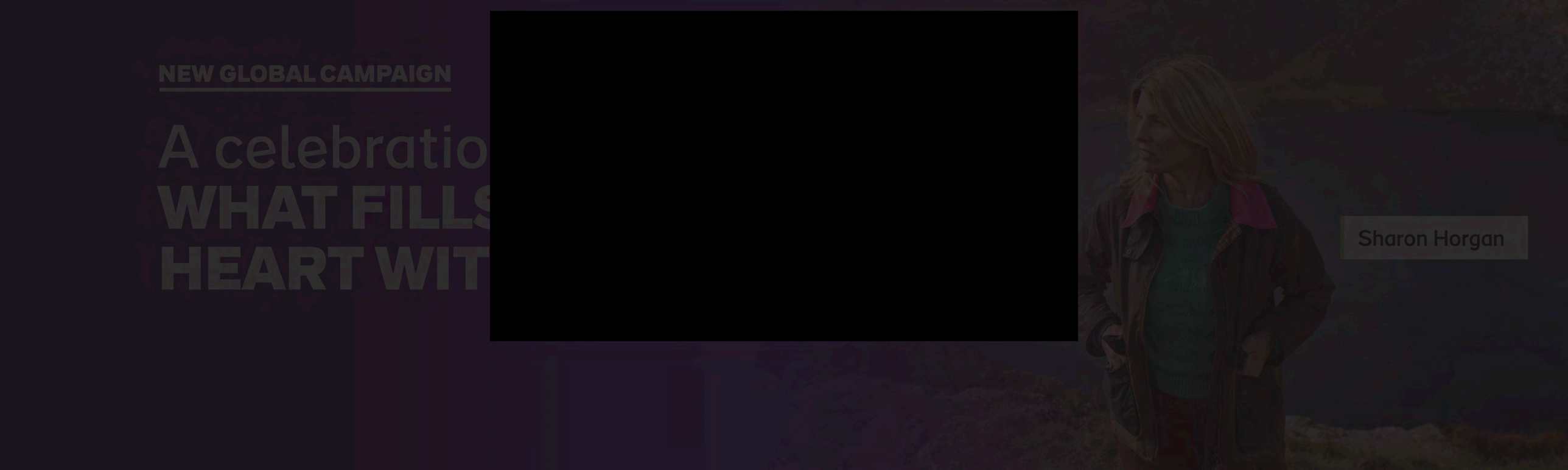
NEW GLOBAL CAMPAIGN

A celebration of **WHAT FILLS YOUR HEART WITH IRELAND**



NEW GLOBAL CAMPAIGN

A celebratio
WHAT FILLS
HEART WIT



Sharon Horgan



2023



2023 YEAR OF REBUILD


Tourism Ireland
THANK YOU