



Driving Tourism Sustaining Communities

Our Priorities to 2017



Fáilte Ireland
National Tourism Development Authority



Driving Tourism Sustaining Communities Our Priorities to 2017

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Foreword

This booklet sets out the mission, vision, values and goals underpinning Fáilte Ireland's work programme to 2017, to support the tourism sector attain longer-term objectives as set by Government.

Our overriding priority in this Strategy is to support sustainable tourism growth. The potential of the sector to expand further, generating incremental revenue growth and sustaining increased levels of employment at community level is clear and imminently achievable.

In many respects, the performance of tourism is inextricably linked with assets outside of the sector's control or influence; beautiful scenic landscapes, our built heritage and our unique Irish culture. These are assets to be nurtured and enhanced. State support, strategically focused, plays a pivotal role in creating the conditions within which individual tourism enterprises can adapt and grow, by protecting and enhancing access to these key assets and by equipping enterprises, predominately small, with the necessary skills and insights to flourish. The contribution of the sector to generating foreign earnings, employment and taxation receipts is a solid basis for investing in tourism.

This growth strategy builds on the very successful business support strategy implemented by the Fáilte Ireland team during the recent economic downturn. That strategy, like our strategy to 2017, called for a fundamental reorientation of our support services, reskilling of staff, new working arrangements and increased productivity. The commitment of our colleagues to adapt to new circumstances and to professionally contribute to and deliver on a challenging new agenda is critical to this organisation's continuing success. I would like to acknowledge that commitment, dedication and professionalism and to express my confidence in and appreciation of everyone in 'Fáilte team' for their role in implementing this Strategy Statement.



Shaun Quinn
Chief Executive



Introduction

Tourism is a substantial contributor to the Irish economy in terms of generating foreign earnings, supporting employment growth and sustaining rural economies. It is also a key contributor of taxation receipts to the Exchequer. In the context of a generally supportive policy environment, the potential of the sector to further increase its economic contribution is widely acknowledged.

Following a protracted period of decline, induced in the main by economic downturn across key source markets, **tourism to Ireland is recovering again**. Sustaining this recovery short-term and achieving ambitious growth targets long-term are issues currently concentrating minds across the sector.

The continuing pressures on disposable incomes within Ireland underscore the increased importance of international markets to the sector over the coming years. In that context, the current indications are that **growth prospects will be strongest in those overseas markets in which Ireland has already established a strong reputation for its tourism offering**. This is not to overlook the longer-term potential of developing markets around the world.

The task of securing sustained growth in international tourist arrivals and receipts should not be understated. Although global tourism is projected to record double-digit growth over the period to 2021, prospects for the much more mature European market are more modest by comparison. Consequently, destinations like Ireland will have little choice but to **strive to increase its share of target markets** if its ambitious growth targets are to be realised.

This has obvious implications for the competitiveness of Ireland's tourist offering, how that offering is presented internationally and how well equipped Irish tourism enterprises are to secure incremental international sales, particularly against the backdrop of a relatively high reliance on the domestic markets.

We are very much of the view that the targets set out for tourism growth over the period to 2025 are attainable.

Our view is predicated on the key assumption that the sector will succeed in raising its game internationally in a number of respects.

Specifically, the sector will succeed in:

- **Enhancing its understanding** of the evolving target market segments;
- Improving its ability to **innovate and differentiate** its visitor offerings based on that understanding;
- Developing **compelling visitor propositions** of scale with associated experience brands capable of achieving standout in the marketplace and providing vitality and depth to the Ireland brand;
- Achieving a step-change in its capability to compete and collaborate in the '**digital ecosystem**' for tourism and travel;
- Protecting and nurturing its key **environmental and cultural assets**.

As an organisation focused exclusively on the sustainable development of Irish tourism, Fáilte Ireland must ensure that its goals, strategies and programmes are at all times aligned to the emerging needs of the sector. Our previous and very successful Strategy was formulated for a very different time; a time of readjusting to weakening demand, re-engineering business processes, restructuring gearing and restoring profitability.

Our Strategy for the period to 2017 has been prepared to set out clearly the revised goals and objectives of Fáilte Ireland set against a background of emerging market recovery and growth and to articulate the supporting strategies which the organisation will implement with the sector and its stakeholders over the period.

In this handbook we begin by summarising the mandate, mission, vision and values of Fáilte Ireland. We then sketch the policy context within which our strategy is framed. We present a concise snapshot of the tourism sector followed by some key issues emerging in our external environment. The framework adopted in preparing this strategy is summarised and we outline some key desired outcomes and associated recommended actions.

Our Mandate, Mission, Vision and Values

Organisation Mandate

Fáilte Ireland established under National Tourism Development Authority Act 2003. Its primary functions as specified in legislation include:

- To encourage, promote and support the development of tourist traffic within and to the State and to support enterprises and projects in this regard.
- To encourage, promote and support the recruitment, training and education and development of persons for the purposes of employment with the tourism industry.
- To promote and engage in research and planning.
- To establish and maintain registers of accommodation facilities.

Fáilte Ireland is also a designated prescribed body in planning legislation.

In essence, Fáilte Ireland is responsible for providing a range of tailored support services across the tourism value chain from strategic research, product innovation, business process improvement and environmental advocacy to learning, standards, sales and marketing with the overall objective of supporting tourism growth.

Our Mission

To promote and support sustainable development of tourism as a key indigenous driver of the Irish economy.

Our Vision

To be recognised nationally and internationally as a dynamic innovative and highly effective provider of business development solutions and supports for tourism in Ireland.

Our Values

We value exploration and imagination in our search for solutions.

We seek to inspire others to achieve great results.

We value collaborative working in all its forms.

We strive to learn from our experiences and to sharing those learnings with others.

We are committed to innovation and continually evolving our service offering.



The legislation governing Fáilte Ireland facilitates the provision of a wide range of supports to the tourism sector extending throughout the sector's value chain; from strategic research and innovation to marketing sales and visitor servicing.

In executing its remit, Fáilte Ireland adheres to a number of **key principles** which recognise both the organisation's resource constraints as well as tourism priorities set by Government.

These guiding principles may be summarised as follows:

- **Satisfying** the existing and emerging needs of international and domestic **visitors** is our primary concern.
 - We encourage and support the tourism sector to **profitably deliver authentic and immersive visitor experiences** at great value.
 - In facilitating the tourism sector, we are also concerned with ensuring that **supporting tourism-related infrastructure is fit for purpose**.
 - Our developmental efforts are concentrated on those areas and activities which offer the **greatest prospects for return on investment**.
 - Our investment decisions are **guided by market insight**, subject to rigorous analysis and are based on attainment of agreed outcomes.
- We deliberately avoid provision of support services or investment support which are available elsewhere in the State.

Tourism Policy Context

This strategy draws heavily on the recently published Tourism Policy Statement ("People, Place and Policy – Tourism to 2025") which sets out clear and ambitious targets for the development of Irish tourism.

In essence, this policy is framed within the context of the tourism sector welcoming 10 million visitors by 2025 with associated revenues of €5 billion (as 2014 prices) and sustaining 250,000 persons in employment.

In order to achieve this target, the Government affirms and has agreed that:

- It will place tourism as a key element of its economic strategy, with development in the sector reflecting the highest standards of environmental and economic sustainability.
- Our people and our place remain our biggest assets in terms of our ability to attract an even greater number of tourists from overseas.
- The marketing of Ireland as a visitor destination will aim to generate a balance from both mature and developing markets.
- Our heritage assets will be protected.
- Public investment in tourism will be based on evidence.
- There will be a clear and coherent framework for the development of human capital in the sector.
- There will be an enhanced role for Local Authorities and recognition of the contribution of communities to tourism.

“Tourism is one of Ireland’s most important economic sectors and has significant potential to play a further role in Ireland’s economic renewal”.

“By 2025, the Government’s ambition is that overseas tourism revenue will reach €5 billion in real terms”.



Our Ambition to 2017

Our Ambition to 2017

This strategy has been formulated in the context of the Government's policy framework and longer-term objectives for the tourism sector. The measures and actions outlined in this handbook are designed to support that policy framework and to achieve progress in the following areas:

- To significantly **grow foreign earnings** from international business and leisure visitors to Ireland.
- To sustain and further **grow tourism employment**.
- To increase the **economic contribution of tourism across local communities** within Ireland.
- **To build the capacity of the tourism sector to compete** more successfully internationally and to become more self-sustaining.
- To ensure that the **contribution of tourism** to economic growth and regional development is **fully recognised and understood**.

Key Metrics

	2014	2017	2025
Foreign Earnings	€3.6 billion	€4.2 billion	€5.0 billion
Tourism Employment	205,000	230,000	250,000
Visitor Numbers	7.6 million	8.2 million	10 million



GROWTH

#Irish Tourism Today

 **Fáilte Ireland**
National Tourism Development Authority
@FaiIte_Ireland

Tourism contribution to Ireland's GNP is 4%
#Significant

RETWEET 4 FAVORITE 6

 **Fáilte Ireland**
National Tourism Development Authority
@FaiIte_Ireland

€6.5 billion in total tourism revenue
#Impact

RETWEET 4 FAVORITE 6

 **Fáilte Ireland**
National Tourism Development Authority
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205,000 employed in Irish tourism
#Jobs

RETWEET 4 FAVORITE 6

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€5 billion in foreign exchange earnings
#Growth

RETWEET 4 FAVORITE 6

 **Fáilte Ireland**
National Tourism Development Authority
@FaiIte_Ireland

300,000 airline seats per week
#Access

RETWEET 6 FAVORITE 5

 **Fáilte Ireland**
National Tourism Development Authority
@FaiIte_Ireland

€1.5 billion in tax revenue generated by tourism
#Economy

RETWEET 4 FAVORITE 6

 **Fáilte Ireland**
National Tourism Development Authority
@FaiIte_Ireland

€1.5 billion in domestic tourism revenue
#thisisLIVING

RETWEET 6 FAVORITE 5

 **Fáilte Ireland**
National Tourism Development Authority
@FaiIte_Ireland

7.1 million overseas visitors
#Inbound

RETWEET 4 FAVORITE 6

 **Fáilte Ireland**
National Tourism Development Authority
@FaiIte_Ireland

99% overseas holiday-makers saying Irish holidays exceeded or matched expectations
#Wow

RETWEET 6 FAVORITE 5

 **Fáilte Ireland**
National Tourism Development Authority
@FaiIte_Ireland

7.4 million domestic trips
#DiscoverIreland

RETWEET 6 FAVORITE 5

Irish Tourism Today

The tourism sector in Ireland is continuing to **recover** following a period of severe contraction coinciding with the onset of the international economic crisis in 2008. Overseas visitor numbers in 2015 are expected to be on a par or just ahead of the peak recorded in 2007. The recovery in visitor revenues has been more modest. The performance of the domestic market has been poor by comparison.

Ireland is **currently performing well in all key overseas markets** and is expected to continue its recent recovery over the period of this strategy. This reversal in tourism fortunes is due to a number of factors; a recovery in the economies of key source markets, improving air and sea access, more effective targeting of specific consumer segments, and the improving competitive position of the Irish tourism sector overall.

The recent upturn in the sector has been **far from uniform**. Dublin has experienced the strongest recovery, due in part to the growing trend towards short city breaks and an improving performance in conferences, corporate meetings and events. The recovery has been such that hotel room availability within the city limits is becoming a matter of concern. Elsewhere, recovery has been patchy, with traditional tourist hotspots fairing best.

A prevalent feature of the sector in recent times has been its **low operating margins** and in turn **low levels of reinvestment** in capital stock. The decision by Government to reduce the VAT rate on tourism and other services to 9% is widely recognised as a critical intervention to sustain many businesses and assist employment growth.

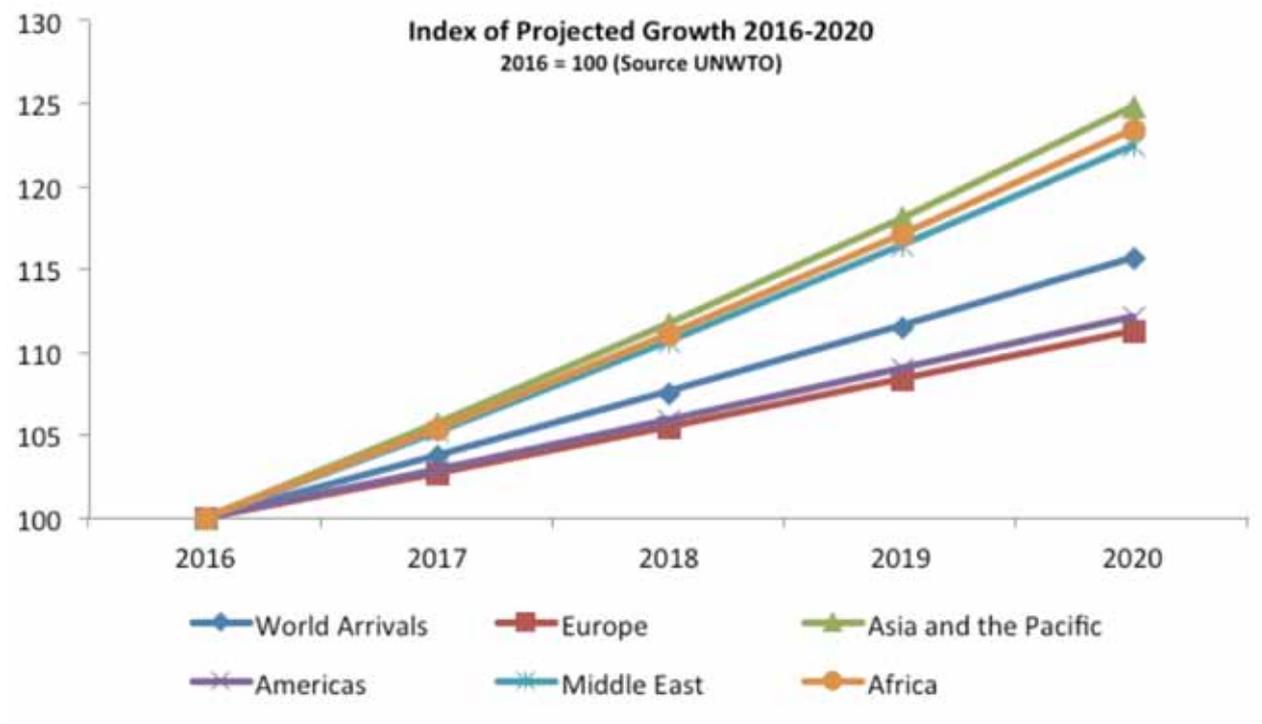
There is now a **renewed confidence** within the sector as a consequence of the recent upturn in overseas markets. Government support for both a new global visitor segmentation model and backing of a portfolio of experience brands (The Wild Atlantic Way, Ireland's Ancient East and Dublin) has helped to galvanise the sector to attain sustainable levels of growth.

In reality, sustaining current levels of **growth presents a challenge** for the sector given the modest growth rates projected for what is a mature European market. The challenge is therefore to **outperform the competition** and progressively increase market share.

A Dynamic and Discerning Marketplace

Global Growth

The upward trajectory in travel and tourism is projected to continue medium term and over the period to 2020 is forecast to grow by a cumulative 16% globally. Developing destinations, particularly in Asia are expected to experience strongest growth. More mature destinations, such as those in western Europe, are expected to grow more moderately.



Evolving Consumer Demands & Preferences

The ways in which consumers think about, purchase, consume and share their leisure and holiday experiences have changed significantly and will continue to do so.

A number of the most notable developments include:

- **Changing Routes to Market: The consumer is increasingly moving to the online world** to plan, book and socialise their holiday experience with friends and family. Online Travel Agents are winning an ever increasing share of business and traditional tour operators have responded by improving their own online presence. And, the consumer is moving from PC based browsing to tablet and mobile, with visitors increasingly active on their preferred social channels whilst on holiday.
- **Authenticity:** The 'old' version of luxury was mostly about exclusive, expensive, best quality, self-indulgent and conspicuous consumption. **Luxury is becoming less about materialism and more about self-enrichment and conscientious consumption.** The emphasis has shifted towards personal, experiential, authentic, and self-development.
- **'Learn to' and 'Cultural Immersion':** There is a burgeoning number of consumers who want to **get beyond a passive holiday** and instead treat their holiday as an opportunity to learn about history, culture and language or indeed learn new skills. They want experiences that allow them to immerse themselves in the destination.
- **Growing Middle Classes (in emerging markets): Growing education and income levels are positively correlated with tourism demand.** Qualitatively, education increases knowledge, awareness and curiosity which often stimulates an interest in travel and raise the level of discrimination. Against this backdrop, the BRIC destinations represent a growth opportunity over time.
- **The Millennials: Those born between 1980 and 2000 are much more tech savvy and have embraced social media,** with major implications for how goods and services are bought and consumed. For example, this generation:
 - Increasingly use mobile devices to plan and book
 - Demands instant product information and price comparisons when purchasing (they grew up in a recession)
 - Is more influenced by peer decisions and behaviours than by traditional norms and conventions
 - Seeks out local authentic experiences with higher levels of customization
 - Are very values driven and expect to see the brands they buy adhere to their values (such as responsible management of the environment).
- **The Sharing Economy:** Heavily steered by the Millennials and the increasing trust placed on peer reviews, some people are increasingly reluctant to buy items as they can access them in other ways. **In tourism, the sharing economy is most visible in accommodation** (e.g., Airbnb) and **transport** (e.g. Uber), but it will also influence where people eat and what they do on holidays.
- **Conference & Incentive Travel growth:** The available evidence suggests that **continued growth in the global conference, meetings and incentive travel can be expected.** As the commitment to networking and shared learning grows apace, conference business will benefit. The recovering economy in key markets has also resulted in large employers dialling-up their staff incentive programmes again as they seek to accelerate growth and reward performance.



The Wild Atlantic Way captivates you with its wild landscape that continuously shapes its living history and engages you with its vibrant & creative communities, whose stories and culture stimulates you, so you are freed up to relax, enjoy and leave feeling refreshed, renewed and uplifted.



Strategic Framework

Issues Arising for Irish Tourism

Our analysis of the emerging market environment for the Irish tourism sector highlights both opportunities to be pursued and challenges to be overcome. Inherent limitations within the sector are also evident.

The key opportunities include:

1. Projected **growth** in international leisure and business travel and tourism
2. Growing consumer demand for **authentic and immersive** visitor experiences
3. The increasing role of **technology** in facilitating visitor's 'path to purchase'
4. The growing importance to visitors of care for the natural **environment**

Key challenges identified include:

1. Ireland's core markets are likely to experience **below average growth rates**
2. **Achieving 'standout'** in an increasingly noisy marketplace
3. The increasingly **complex and competitive distribution** channels for tourism



The continuing dynamic nature of the tourism marketplace with its discerning visitor profiles present issues for the Irish tourism sector which include:

1. Placing an increasing **emphasis on international markets to secure growth** and as a consequence reducing its heavy reliance on domestic tourism.
2. **Concentrating development efforts on growth segments** within existing core markets, where Ireland's tourism offering resonates positively, and succeeding in winning market share.
3. Gaining a **deep understanding of the needs and motivations** of targeted consumer segments, offering greatest prospects for growth, and responding with a world-class visitor experience which extends from 'looking and booking' to 'arrival, immersion, engagement and enjoyment'.
4. **Collaborating across the sector** and developing offerings within signature experience/experience brands of both scale and singularity to achieve standout in the market.
5. **Collaborating beyond the sector** to embrace the contribution of local communities in offering authenticity and immersion in local culture.
6. **Understanding dynamics in key channels of distribution** and building capability to achieve incremental sales.
7. Ensuring the sector operates **to 'best in class' in the digital ecosystem** for tourism and travel in order to facilitate superior showcasing of experiences and ease of purchase.
8. Achieving **operational excellence** to ensure visitors are offered great value at a profit.

Tenets of Fáilte Ireland's Strategy

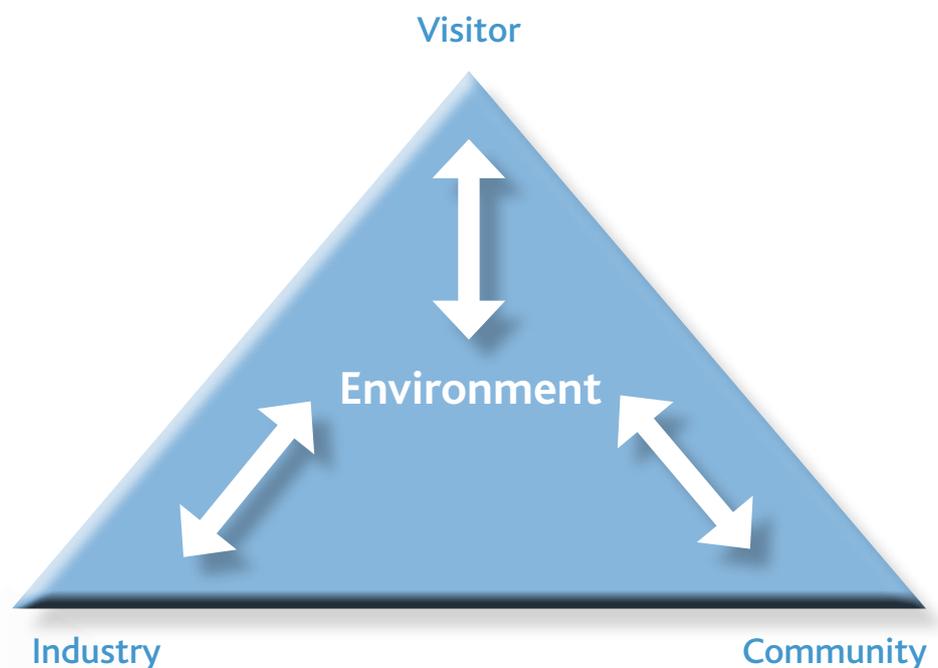
In formulating responses and industry supports to the foregoing analysis, Fáilte Ireland has identified a number of guiding principles to shape its work over the period of this strategy statement.

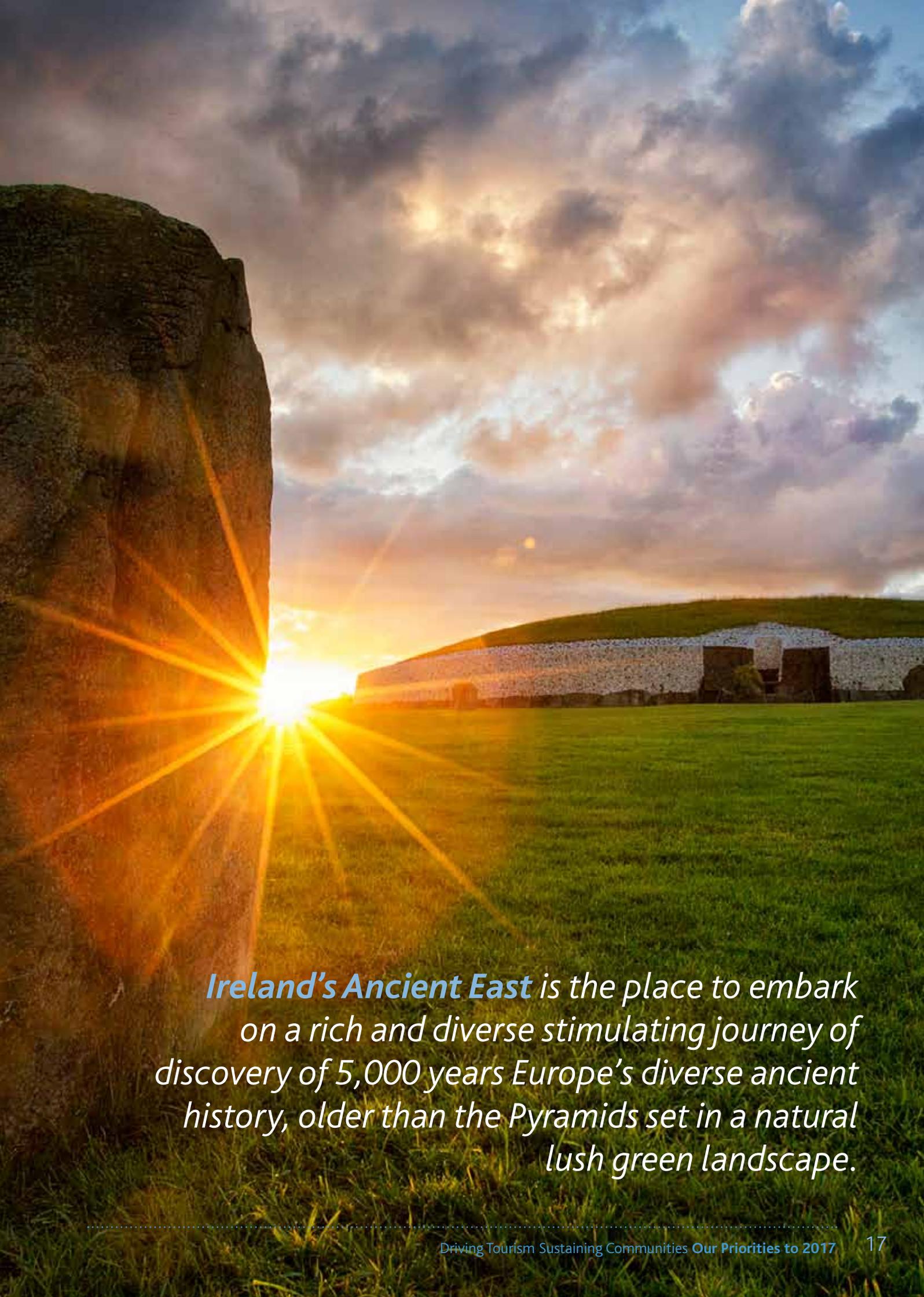
These include the following:

1. **Resources will be prioritised** in favour of programmes which assist the tourism sector to secure an increased share of international leisure and business tourism.
2. In leisure tourism, **efforts will be concentrated** on further developing three existing experience brands (Wild Atlantic Way, Ireland's Ancient East and Dublin).
3. **Collaborating closely** with other public sector stakeholders to ensure a 'joined up' approach to tourism development.
4. **Partnering with** Tourism Ireland Ltd. and other marketing groups to ensure visitor experiences are widely available to channel intermediaries and consumers.
5. **Concentrate our enterprise support programmes** on interventions aimed specifically at revenue growth and yield management.

The V-I-C-E Framework for Sustainable tourism

The strategic priorities and recommended actions to be implemented by Fáilte Ireland over the period to 2017 are framed within the internationally recognised VICE framework. This identifies sustainable tourism as the interaction between **Visitors**, the **Industry** that serves them, the **Community** and culture that hosts them and their collective impact on and response to the **Environment** where it all takes place. In this strategy statement we have identified desired outcomes for each pillar of this framework.





***Ireland's Ancient East** is the place to embark on a rich and diverse stimulating journey of discovery of 5,000 years Europe's diverse ancient history, older than the Pyramids set in a natural lush green landscape.*

Desired Outcomes and Recommended Actions

OUTCOME 1

Ireland Successfully and Consistently Delivers a World-Class Visitor Experience

Ireland's success in securing and retaining an increasing share of its target markets will be determined to a large extent by its ability to fully understand the evolving tastes and preferences of its consumer segments and in turn delivering immersive and compelling visitor experiences. The basis for competing must be differentiation **and** quality – delivering authentically Irish experiences to a high standard of quality and service and providing value for money.

Ireland has exceptionally high quality natural and cultural assets upon which to trade. However, in a response to clear lack of awareness among overseas visitors about exactly what kinds of experiences Ireland has to offer, there was a need to develop a number of overarching brand propositions of scale and singularity, which could provide the necessary 'cut-through' to overseas markets. These propositions are Dublin, the Wild Atlantic Way and Ireland's Ancient East. These are the platforms upon which Ireland can present a portfolio of world-class visitor experiences.

In this strategy, world-class visitor experiences are further defined as:

- Engaging with Ireland's natural and built heritage, unique culture and history.
- Providing strong motivating reasons in their own right to visit Ireland.
- Being adaptable to the changing motivations and tastes of our core target market segments.
- Enjoying high levels of buy-in and involvement by tourism businesses and communities at a local level to delivering on the overall experience.
- Embodying the principles of sustainable tourism at their heart, in terms of visitor management, resource protection and community involvement.

Priority Areas for Improvement to Support World-Class Visitor Experiences

Progress in the following seven areas is viewed as particularly important to achieving this outcome.

1. The **presentation of Ireland's experiences** to potential visitors in 'the digital world' is significantly improved.
2. The design and delivery of visitor **experiences exceeds visitor expectations**.
3. Ireland's tourism-related **infrastructure is fit for purpose**.
4. **Standards and quality systems** reflect the needs of targeted consumer segments.
5. **Tourist information** is widely accessible at all stage of the customer journey.
6. **Attitudes and perceptions of visitors** to all aspects of the tourism experiences are continually monitored and incorporated into product and service improvements.
7. Ensure that the quality, character and distinctiveness of the core resource, either cultural or natural, is maintained and enhanced.

To improve the presentation of Ireland's visitor experiences online

1. Expand and sustain **E-capability training and mentoring programmes** to all visitor experience providers to ensure optimum presentation of their own product and service offerings as well as those of other supporting enterprises.
2. Provide for the **creation, curation and sharing of compelling digital content** across tourism enterprises, marketing groups, tourism organisations and communities.
3. **Seek to build connectivity** between all players within the digital ecosystem to ensure that the Ireland tourism offering is presented comprehensively and collaboratively.

Recommended Actions

To ensure experiences exceed expectations

1. Invest in a sustained programme of **focused market research**, to better understand the motivations and needs of targeted consumer segments, and disseminate learnings directly to experience providers.
2. Facilitate, mentor and support tourism providers and associated networks in **crafting, testing and delivering new visitor experiences** to an exceptionally high standard.
3. **Work in partnership with Local Authorities** to enhance the program of Festivals and Events.





Recommended Actions (continued)

To ensure tourism-related infrastructure is fit for purpose

1. **Provide tailored capital investment support** to assist the introduction and/or enhancement of critical components of infrastructure with Local Authorities including, walks, greenways, blueways, interpretation and orientation facilities and discovery points.
2. Encourage and support the **delivery of specific facilities** with strong tourism appeal and supporting signature propositions within the tourism offering (Wild Atlantic Way, Ireland's Ancient East, Dublin).
3. Engage with Local Authorities, the NRA and others to **improve directional and way finding signage**.
4. Partner with the **Office of Public Works and the National Parks and Wildlife Service** in enhancing the visitor appeal of their respective assets.
5. Advocate for the extension and upgrading of **broadband services** in rural tourism destinations.

To ensure standards and quality frameworks are appropriate to consumer needs

1. **Review and improve existing provisions** for registrations and classification in the context of emerging consumer needs.
2. Provide for the incorporation of business categories not catered for within existing measures to **promote innovation and service excellence**.
3. Promote recognition and utilization of **independent review sites** as a means to further enhance service levels.



To have widely accessible and high quality tourist information

1. Invest further the **national visitor servicing network** to expand the range and improve the timeliness of information provided.
2. Further **utilize technology solutions** as a means to facilitate information access at any time.
3. **Promote the sharing of data** from the visitor information service across the sector.



To systemically track the attitudes and perceptions of visitors

1. **Review all surveying of visitor attitudes** with a view to obtaining a more critical and insightful perspective for incorporation into tourism development.
2. **Ensure comprehensive dissemination** of all pertinent data to experience providers and stakeholders.

To ensure that the quality, character and distinctiveness of the core resource, either cultural or natural, is maintained and enhanced

1. **Closely monitor key indicators of environmental change** to enable early detection of pressure on important natural and cultural resources upon which tourism depends. Communities are provided with opportunities to become active participants in the development of tourism in their locality.



*Dublin is a vibrant capital city
bursting with a variety of surprising
experiences – where city living thrives side by
side with the natural outdoors*





OUTCOME 2

Ireland's Tourism Sector is Profitable and Achieving Sustainable Levels of Growth

The extent to which the Irish tourism sector can attain its longer-term growth objectives hinges inevitably on the abilities of existing and new tourism enterprises to meet visitor expectations profitability on a sustained basis such that they can reinvest and expand their operations. In general, consistently profitable enterprises benefit from having a deep understanding of their customer's needs and are able to service those needs competitively through the most appropriate channels while offering good value.

The Irish tourism sector is currently emerging from a period of exceptionally low profitability and minimal reinvestment in capital as a consequence of a weakening in demand coupled with a high cost base. With many key markets now recovering and many businesses working off a reduced cost base and improving revenue management, the prospect of a return to profitability is very real.

However, the emerging competitive environment is such that tourism sector will collectively have to further improve its operating performance if targeted levels of growth are to be realized and sustained.

Priority Areas for Improvement to Support Profitability and Growth

There are six key areas where individual tourism enterprises must improve operational performance to sustain growth.

1. Tourism **enterprises invest and collaborate** in designing and selling authentic and compelling experiences tailored to the needs of targeted consumer segments.
2. Tourism **managers improve operational efficiency** from gaining a sound understanding of the cost and value drivers of their enterprise.
3. The sector further improves its ability to **attract, develop and retain skilled staff** to help drive their business forward and improve service levels.
4. Tourism enterprises leverage the existing asset base by successfully **developing business across the shoulder seasons**.
5. Where appropriate, tourism businesses will develop incremental business in the relatively **high yielding meetings, incentive, conferencing and events** markets.
6. The tourism sector will enthusiastically **incorporate relevant market insights and performance data** into decision making.

Recommended Actions

Tourism enterprises are supported in designing and selling compelling visitor experiences:

1. Invest in **facilitating and supporting enterprise networks** in the delivery of authentic and immersive experiences that engage and delight visitors and encourage them to dwell longer and spend more.
2. Develop a **deeper understanding of distribution channels**, in particular the strategies of those most appropriate to Ireland's tourism enterprises in order to facilitate decision making and purchase.
3. **Explore collaborative matched funded programmes** to promote destination and seasonal growth objectives.

Tourism managers improve operational efficiency

1. Implement specific enterprise supports to **deepen understanding of international sales and distribution** and to build capability in developing a robust business portfolio across new and existing markets.
2. Expand training and mentoring programmes focussing on **improving revenue management skills** and enhancing operational decision making within tourism enterprises.
3. Develop toolkits to promote the principles of **operational best practice** across tourism SME's.

Attracting, developing and retaining skilled staff

1. Promote the importance and benefits of accredited skilled staff within tourism enterprises.
2. Continue to invest strategically in the education of hospitality students in further and higher education and work to support new apprenticeship models of accredited training.
3. Adopt the recommendations findings of the forthcoming report from the Expert Skills Group on the tourism sector.
4. Encourage, promote and support professional bodies and trade representative associations to provide training and development programmes for tourism employees in specific areas of competence.

Building business in the shoulder seasons

1. Work with all industry partners to **shape product and experience offerings** that can attract targeted consumer groups across the year.
2. Encourage and **support a portfolio of festivals and sports/cultural events** capable of attracting visitors to travel during the shoulder season.
3. Undertake with the tourism sector, **tailored marketing campaigns** to stimulate domestic demand off-season and trigger short break travel decisions.
4. **Work with the tourism sector, tour operators and Tourism Ireland** to heighten the appeal of the Wild Atlantic Way, Ireland's Ancient East and Dublin in the off-season.

Meetings, Incentive, Conferencing and Events

1. **Increase investment** in the generation and conversion of business leads across key markets.
2. **Improve the effectiveness** of both structures and business processes to enable incremental business growth.
3. **Introduce new support** programmes to specifically target the international event sector and achieve business growth.
4. Work with the sector and intermediaries to review and **enhance the quality and presentation of Ireland's incentive offering**
5. **Increase the performance of all regions** as a consequence of securing business growth.
6. Further **enhance the suite of sales development supports** available to Ireland's conference ambassadors, PCOs and DMCs to ensure Ireland remains competitive in the global marketplace.



Utilising insights to underpin development

1. Implement, on behalf of enterprise clients, a **multi-annual programme of needs and motivational research** of specific channel intermediaries and consumer segments as a means of informing new product, service and experience development.
2. Provide for the **dissemination and interpretation of relevant market insights** to enterprise clients in facilitated networks designed to identify and agree changes in business strategies.
3. Initiate a programme of focused **competitor benchmarking** to contribute to enterprise development and experience development strategies.
4. We will monitor **value for money perceptions** on an ongoing basis and trigger appropriate industry responses to any challenges that arise.

OUTCOME 3

Communities in Ireland are facilitated to play enhanced role in developing tourism in their locality, and tourism in turn, plays its part in strengthening and enriching local communities.

In addition to landscape and culture, people are among Irish tourism's greatest asset. In fact, it could be said that it is the only one of these three assets that truly sets us apart from our competitors. Annual visitor attitudes surveys consistently confirm the exceptionally high levels of surprise and satisfaction among our visitors arising from their engagement with Irish people.

Most of the tourism businesses that host and offer experiences to our visitors are locally owned and embedded within local communities. In fact, it is almost impossible to disentangle local businesses from local communities.

At the heart of Irish tourism are all things local. All of our heritage and landscape is local; even our World Heritage Sites are rooted in local communities and there is no-one better to relate the stories of these places to our visitors than the locals.

Tourism also has a contribution to make in strengthening and enriching local communities. Tourism funded interpretation projects involving local communities can result not only in the generation of valuable interpretative content for visitors, but the process of undertaking the project itself can also result in greater levels of social cohesion, particularly at an inter-generational level. In order for communities to share their stories with our visitors, they must first share it among themselves. For example, 80% of the interpretative content collected for the recently completed Loop Head Heritage Trail arose from local interviews which were conducted by the community.

The Leader Programme, in particular, has resulted in many such projects and it is why this Programme should continue into the future with a strong focus on tourism and rural development. Furthermore, from an economic perspective, tourism initiatives such as the Wild Atlantic Way are primarily aimed at enhancing the economic fortunes of local rural communities and creating jobs in these communities often by stimulating the creation of new tourism enterprises. The level of innovation and enterprise in the tourism sector which has a direct socio-economic benefit for rural communities is on the rise, stimulated by initiatives such as the Wild Atlantic Way.

Priority Areas for Improvement to Support Communities in Tourism

The following four areas have been identified for particular attention in embracing the role of communities in tourism.

1. There is a high level of awareness and **support for tourism at local level**.
2. Communities are provided with opportunities to **become active participants** in the development of tourism in their locality.
3. The **wealth of local and community stories is gathered** so that these to be shared with our visitors via digital and other means.
4. Tourism businesses **recognise and incorporate communities** in to the development of tourism initiatives and strategies.

Recommend Actions

Promoting awareness and support for tourism at local level

1. Host a series of events at **which local communities can share their ideas and issues** can be identified and resolved.
2. Develop a forum/ platform to share these ideas and **showcase best practice** across communities.

Communities participate in the development of local tourism

1. Build on the existing work being undertaken with communities, particularly by Local Authorities, Heritage Council, DAHG, OPW, in the area of **local interpretation**.
2. **Support community based initiatives** which seek to enhance and deliver new visitors experiences aligned to the brand proposition across a range of skills and activities including guiding, storytelling, interpretation, etc.





Community stories are gathered for sharing with visitors

1. Establish a programme for **collecting and validating local stories** guided by insights around the needs and motivations of visitors.
2. Develop a **content management system** for local stories, imagery and traditional culture.
3. Create a **volunteerism programme** that enables communities to capture, package and tell their stories to visitors in an authentic and compelling way.

Tourism businesses embrace communities in tourism development

1. A sustained programmed series of '**Discovery Days**' are held to allow communities and businesses to engage and share ideas/ knowledge of an area.
2. **Communities and tourism businesses are supported** to work together to develop experiences and packages to bring through the local and distinctive 'sense of place'.

OUTCOME 4

Ireland's natural environment is recognised, valued and enhanced as the cornerstone of Irish tourism

Ireland has some of the most natural and unspoilt environments in the world. In addition to this our position at the edge of the Atlantic and our mild climate means that our landscapes and wildlife differ from other countries and are distinctly Irish. The future of Irish tourism is inextricably linked to the quality of this very environment. Our scenic landscapes, coastline, rivers and lakes, and cultural heritage are the bedrock upon which Irish tourism has been built.

Unlike many other countries particularly on mainland Europe, where city or resort tourism forms the most significant part of the tourism offering, the essence of Ireland's tourism proposition is mostly rural in nature. With more and more people now living in urban areas all around the world, the appeal of this rural proposition is likely to increase in response to a greater desire to 'get away from it all' and reconnect with a more natural rhythm and pace of life. This will present both opportunities and challenges. However tourism, when it is well managed and properly located, should have the potential to benefit the local community, the local environment itself and the visitor alike.

Priority Areas for Improvement to support the natural environment

Five key areas need to be addressed to ensure that the natural environment is recognized, valued and enhanced as a cornerstone of Irish tourism.

1. Awareness and appreciation of Ireland's unique landscape and environment is increased.
2. Voluntary and community-led environmental protection projects which in turn benefit tourism are supported.
3. Environmental performance amongst tourism businesses is increased.
4. Protection of key environmental and tourism assets is vigorously advocated.
5. Sustainable modes of **transport** are available and accessible to visitors.

Recommended Actions

Increasing awareness and appreciation of Ireland's unique landscape and environment

1. The **natural/ rural essence** of the Ireland's tourism proposition is 'dialled up' for visitors various experience brands.
2. The **visitor experience of rural Ireland is enhanced** through responsible access, infrastructure and interpretation provision.

Supporting voluntary and community led environmental protection projects

1. Support communities and providers to **take responsibility for the protection and enhancement** of their environment through participation in initiatives such as the Clean Coast Programme and Leave No Trace.
2. Support community led projects which seek to **promote awareness and interaction with the local environment.**

Increasing environmental performance amongst tourism businesses

1. Identify **responsible tourism best practice** examples and showcase these to tourism stakeholders.
2. Present the visitor with a **choice of responsible tourism providers/products.**

Advocate for the protection of key environmental and tourism assets

1. Ensure the **quality of the built and natural environment** is considered appropriately at the planning stage of developments by both the private and public sector.
2. Roll out of an **environmental monitoring programme** on the Wild Atlantic Way and Ireland's Ancient East, to monitor, measure and manage any potential impacts which may arise.

Sustainable modes of transport are available and accessible to visitors

1. **Encourage growth in environmental pursuits**, such as walking and cycling, particularly along the Wild Atlantic Way but also in Ireland's Ancient East.
2. **Promote the use of public transport** by integrating the National Journey Planner into digital media communications.





Developing our Organisation

The objectives, priorities and actions associated with this strategy, differ in many respects to those of our previous strategy. Our focus now is business **growth**, not just business survival, our orientation is primarily **international** rather than just domestic and our posture is one of proactively and **collaboratively** promoting tourism growth driven by consumer **insights**, supported by product **innovation** and encouraged with specific **interventions** to boost tourism revenues.

As a consequence, this strategy presents the Fáilte Team with a number of challenges in terms of **building capability** in new areas of high relevance, reimagining and redesigning our **supports and interface with key partners and stakeholders** and redefining our **we measure our success**. Yet, this strategy also offers tremendous opportunities for **self-fulfilment, self-development and career progression** and also for further improving the **reputation** of the organisation.

Building on Success

Fáilte Ireland is regarded as a successful and respected organisation. Since our establishment we have grown in stature, we have adapted to very difficult budgetary and staffing constraints and we have innovated our offering with success in the eyes of our industry partners, Government stakeholders and the general public.

The organisation's DNA is a rich blend of that from nine different business entities, each with their own strengths, together with that from new members joining the team at all levels from the public and private sectors. It's a DNA which favours and promotes initiative, flexibility, professionalism and results.

Our new strategy requires us to build on these foundations and to develop additional competencies and behaviours. It offers the opportunity to be more explorative, inquisitive and perhaps even a devil's advocate in our analysis of issues. It requires us to be open-minded, imaginative and innovative in coming forward with solutions. It encourages us to work more openly, collaboratively and constructively with our colleagues in Tourism Ireland and other players in Irish tourism. It requires that we learn from our own experiences and those of others and to be dynamic and receptive to continual change so that we may continue to evolve and remain highly relevant and effective.

These required behaviours are the prompts behind our values which were referred to earlier. A key task for the management of our organisation is that we these values are allowed to permeate our working environment and encouraged to flourish for the benefit of the organisation and the individual.

Priority Areas for Improvement

1. We embed our mission, vision and values across all parts of the organisation to promote a shared understanding and common purpose.
2. We place the visitor at the centre of all our programmes and activities.
3. We ensure our systems and processes are fit for purpose to support our colleagues in their work.
4. We systematically provide support and guidance to our colleagues in order that they develop the additional competencies and behaviours underpinning our strategy.
5. We provide a clear and unambiguous means by which the contribution of the individual to the implementation of this strategy is tracked, discussed and acknowledged.

Authority and Management

Authority Members*

Michael Cawley *Chairman*
Mary Kerins
Susan Bergin
Noel Kavanagh
Frankie Sheehan
Bridget Halligan Nevin
Jim Deegan
Margaret Ryan
Ciáran O'Gaora
Francis Brennan
Gerard Barron
Mary Rose Stafford

Investment Committee

Michael Cawley
Shaun Quinn
Mary Kerins
Noel Kavanagh

Festivals Committee

Margaret Ryan
Bridget Halligan Nevin
Frankie Sheehan
Ciáran O'Gaora

Registrations & Grading Committee

Jim Deegan
Francis Brennan
Mary Rose Stafford

Audit & Risk Committee

Mary Kerins
Susan Bergin
Noel Kavanagh
Gerard Barron

Executive Committee

Shaun Quinn *Chief Executive (Chair)*
Daragh Anglim, *Digital*
Gary Breen, *Consumer Engagement*
Martina Bromley, *Leisure Sales*
Fiona Buckley, *Strategic Partnerships and Futures*
Orla Carroll, *Dublin*
Alex Connolly, *Communications*
Jenny De Saulles, *Ireland's Ancient East*
Paul Hayden, *Project Management Office*
Paul Keeley, *Director, Business Development*
Miriam Kennedy, *Business Tourism & Events*
Paddy Mathews, *Investment & Innovation*
Fiona Monaghan, *Wild Atlantic Way*
John Mulcahy, *Registrar, Food, Hospitality & Standards*
Deborah Nolan, *Secretary, Finance & Risk*
Ciara Sugrue, *International Promotions & Events*
Caeman Wall, *Research & Policy*

*as at 28th May 2015

