



**An Roinn Iompair
Turasóireachta agus Spóirt**
Department of Transport,
Tourism and Sport



TOURISM ACTION PLAN

2019-2021



© Tourism Ireland - Photographer: Brian Morrison

Table of Contents

Ministers' Statement	4
Introduction	6
Background.....	6
Tourism Action Plan 2016-2018	6
Tourism Action Plan 2019-2021	7
Actions	9
Policy Context.....	10
Marketing Ireland as a Visitor Destination.....	10
Enhancing the Visitor Experience.....	11
Research in the Irish Tourism Sector.....	12
Supporting Local Communities in Tourism	12
Wider Government Policy	13
International Context	14
Co-ordination Structures.....	14
Appendices	15
Appendix 1 - Membership of the Tourism Leadership Group	16
Appendix 2 - Glossary.....	17

MINISTERS' STATEMENT

Tourism is a vital industry in Ireland, one that is perhaps unique in that it reaches every part of the country. It is a sector that has, without doubt, made a very important economic contribution in recent years. 2017 was a record-breaking year for overseas visits to Ireland and marked 7 years of consecutive growth in overseas visitor numbers. The continued growth in visitor numbers reflects the on-going efforts of the tourism agencies, in collaboration with the industry, to market Ireland in a range of markets with the highest revenue growth potential. Initial data for 2018 indicates that we are continuing to grow, with Mainland Europe and North America again performing strongly.

In 2017, according to CSO data, overseas visitors to Ireland generated approximately €4.9 billion for our economy. This figure rises to €6.5 billion if we include the fare receipts of Irish airlines and ferry companies. Domestic tourism was worth €1.9 billion in 2017 meaning the sector was worth approximately €8.4 billion to the economy in current expenditure alone in 2017.

Despite the strong performance and success the tourism industry has enjoyed, we cannot be complacent about the future success of tourism. In 2015 the Government published its Tourism Policy Statement: *People, Place and Policy* with long-term objectives to grow tourism to 2025. These long term objectives were converted into specific actions to be achieved through the Tourism Action Plan 2016-2018.

There were significant achievements which stemmed from the Tourism Action Plan 2016-2018, and record-breaking performance in the tourism sector over the past two years indicates that now is an opportune time to examine the targets set out in the policy statement with a view to recalibration. Following recent national and global developments, a review of our priorities is also timely.

Fáilte Ireland estimates that the tourism sector now supports 260,000 jobs across the economy.

The Tourism Action Plan 2019-2021 sets out actions that the Tourism Leadership Group has identified as priorities to be progressed between now and 2021 in order to maintain sustainable growth in overseas tourism revenue and employment. Each action involves specific tourism stakeholders, both in the public and private sectors, all of whom we expect to proactively work towards the completion of actions within the specified timeframe.

Tourism is a very competitive international marketplace and Tourism Ireland does a great job in marketing the island of Ireland overseas. The vision of this Plan is to enable Tourism Ireland to rejuvenate Tourism Brand Ireland, to implement their strategies for growth in both established and new and emerging markets, and to extend the regional and seasonal benefits of overseas tourism.



© Tourism Ireland - Photographer: Chris Hill

The regional experience brands, developed by Fáilte Ireland, have turned into a real success story with the *Wild Atlantic Way* and *Ireland's Ancient East* benefitting from growing international awareness. The latest tourism brand *Ireland's Hidden Heartlands*, unveiled in 2018, is designed to boost tourism and drive growth across the Midlands region. The Government, through Fáilte Ireland, continues to support the expansion of the tourism experience on the ground with support for product development as well as festivals. Some key actions in the Plan will focus on the optimisation of existing key tourism assets and development of enhanced tourism experiences, further development of food related tourism, and continuation of the Hospitality and Tourism Careers Oversight Group.

Effective research is essential to monitor our performance and the impact of tourism on our economy. This Plan commits to progressing the development of a tourism satellite account, monitoring competitiveness against our competitor set, and gaining a greater understanding of tourism performance factors and tourism's contribution to the economy.

Local Authorities have long recognised the importance of tourism as a contributor to the local economy and have actively engaged with local communities, tourism and hospitality businesses and the State agencies to develop their local tourism experiences. This Plan aims to further build on what has been achieved and ensure a central role for Local Authorities in tourism.

Tourism is affected by a wide range of policies, both at domestic and EU level while many tourism assets are in the care of state bodies. The Department of Transport, Tourism and Sport and the tourism agencies will continue to work to identify and exploit opportunities for convergence between tourism and other areas of Government policy.

Brexit has already impacted on tourism and funding has been allocated to the tourism agencies to ensure that the tourism sector is Brexit-ready. In this context, Fáilte Ireland will implement a programme which places a focus on retaining business from Northern Ireland and Britain whilst also offering supports to enterprises to equip them for the post-Brexit marketplace. Tourism Ireland will implement the recommendations of a recent review of its operations in the British market and also extend the Regional Co-Operative Market Access Scheme.

We would like to thank the Tourism Leadership Group and all relevant stakeholders who took part in the development of this Tourism Action Plan. The insights provided from tourism industry representatives, the tourism agencies, representatives from various Government Departments and the Tourism Leadership Group were invaluable in the development of this Plan. We believe that the completion of these actions will ensure the sustainable growth of Ireland's tourism sector and further the progress made to date in achieving the goals set out in the Tourism Policy Statement.



A handwritten signature in black ink, appearing to read 'Shane Ross' with a flourish at the end.

Shane Ross T.D.
Minister for Transport, Tourism and Sport



A handwritten signature in black ink, reading 'Brendan Griffin T.D.' in a cursive style.

Brendan Griffin T.D.
Minister of State for Tourism and Sport

INTRODUCTION

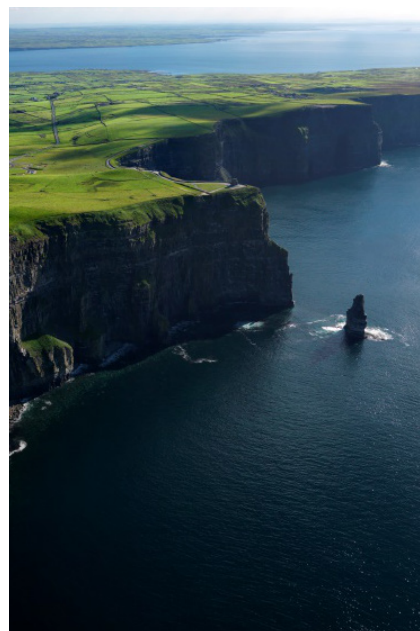
Background

In March 2015 the Government published its Tourism Policy Statement: *People, Place and Policy – Growing Tourism to 2025*. The ambition of this policy statement is to have a vibrant, attractive tourism sector that makes a significant contribution to employment across the country; is economically, socially and environmentally sustainable; helps promote a positive image of Ireland overseas, and is a sector in which people want to work.

The Tourism Policy Statement sets three headline targets to be achieved by 2025:

- Overseas tourism revenue of €5 billion per year net of inflation excluding carrier receipts;
- 250,000 people employed in tourism;
- 10 million overseas visitors to Ireland per year.

In July 2015 a Tourism Leadership Group was established to oversee the formulation of a three-year Action Plan to implement the policy goals set out in the Government's Tourism Policy Statement.



© Tourism Ireland – Photographer: Chris Hill

Tourism Action Plan 2016-2018

The Tourism Action Plan 2016-2018 contained 23 actions that the Tourism Leadership Group identified as the most important issues, to be addressed during the lifespan of that plan, in order to secure continued growth in overseas tourism revenue and employment.

Key achievements in the period have included:

- the development of culinary apprenticeships and investment in tourism and hospitality education;
- encouragement of Government investment in the Tourism Marketing Fund;
- strategy for growth from New and Developing Markets completed by Tourism Ireland;
- progress in developing Ireland as a food tourism destination;
- increased collaboration with Local Authorities, including a successful LA tourism conference and LA tourism Statements of Strategy and Action Plans;
- Fáilte Ireland collaboration with LEOs and ETBs to deliver a community-based shared knowledge and business supports programme;
- government investment in Regional Co-operative Marketing with airlines and airports.

The performance of overseas tourism in Ireland has exceeded all expectations in the period of the Action Plan. In 2015 there were 8.6 million visits to Ireland by overseas visitors compared to 9.9 million visits in 2017, representing an increase of 14.9% in the 2 year period. Both 2016 and 2017 were record-breaking years for overseas visits to Ireland. This success was reflected in the revenue generated by overseas visits to Ireland. In 2015 associated-spend by overseas travellers was €4.2 billion compared to €4.8 billion in 2017, representing an increase of 15.8% in the 2 year period.

In order to sustain the recent success in tourism, a Tourism Action Plan for the three year period 2019-2021 has been developed. Over the summer and early autumn of 2018, three workshops were held to consult with Tourism Leadership Group members, the tourism agencies and other key tourism stakeholders.

25 tourism related organisations participated in three workshops to help produce the 27 actions included in the Tourism Action Plan.



Picture from the second Tourism Action Plan workshop held in June 2018.

The resulting Plan contains 27 actions focusing on the following areas:

- Policy Context
- Marketing Ireland as a Visitor Destination
- Enhancing the Visitor Experience
- Research in the Irish Tourism Sector
- Supporting Local Communities in Tourism
- Wider Government Policy
- International Context
- Co-ordination Structures

Successful implementation of the Tourism Action Plan 2019-2021 will require the input of tourism stakeholders from both the public and private sectors. There will be a periodic reporting process to record progress towards the identified actions, and a corrective process where progress does not meet expectations.



© clearskiesahead

ACTIONS



ACTIONS

Policy Context

No.	Action	Responsible Stakeholders
1.	A working group has been established to review current tourism performance and the potential for recalibrated growth targets while retaining a focus on overseas visitor revenue. The Group will report to the Tourism Leadership Group with their recommendations.	DTTAS, FI, TI, ITIC
		Q1 2019
2.	A working group has been established to review international policy and best practice in sustainable tourism and propose guiding principles for sustainable tourism development in Ireland. The Group will report to the Tourism Leadership Group with their recommendations.	DTTAS, FI, TI, ITIC
		2019

Marketing Ireland as a Visitor Destination

No.	Action	Responsible Stakeholders
3.	Tourism Ireland will deliver a new tourism brand campaign for the island of Ireland to further enhance Ireland's tourism image overseas. This campaign will place a greater emphasis on regional growth and season extension through the promotion of outdoor activities, Ireland's developing food experiences, and will help build the attractiveness of some of our less well-known attractions and regions internationally.	TI
		2019-2021
4.	In the context of the Government's Global Ireland 2025 initiative, Tourism Ireland, with the support of Fáilte Ireland, will implement the published strategies for growth founded on wide-ranging assessments of markets carried out with industry in the US, Germany as well as New and Emerging Markets.	TI, FI
		2019-2021
5.	As part of their overall framework of market reviews, Tourism Ireland, with the support of Fáilte Ireland, will implement the strategy for growth for GB founded on the completed GB market review, while mindful of the impact of Brexit.	TI, FI
		2019-2021
6.	The Regional Co-operative Market Access Scheme promotes air and sea access direct to the Wild Atlantic Way and Ireland's Ancient East and is administered by Tourism Ireland with matching funding from airlines, sea carriers, airports, ports and regional tourism stakeholders including Local Authorities. In light of the likely impact of Brexit on the regions, the Regional Co-operative Market Access Scheme will be extended for 2019 and reviewed thereafter.	TI, DTTAS, airports and port companies outside Dublin, Local Authorities, local tourism interests
		2019

Enhancing the Visitor Experience

No.	Action	Responsible Stakeholders
7.	Building on existing partnerships, and within the framework of Project Ireland 2040, Fáilte Ireland will continue to develop enhanced tourism experiences with a view to optimising key assets for the benefit of tourism and economic development through increasing regional spread, season extension and promoting sustainable growth management. This will initially involve the examination of new tourism experiences and/or an optimisation of existing tourism experiences or clusters.	FI
		2019-2021
8.	Fáilte Ireland and Bord Bia will continue to collaborate on the development of food-related experiences for tourists and developing Ireland as a food tourism destination. In particular, the development of an annual 'Season of Food' programme will be explored to raise awareness and improve perception of the Irish food offering.	FI, TI, BB, EI, BIM
		2019-2021
9.	The Tourism Leadership Group notes that the Hospitality and Skills Oversight Group (HSOG) is to reconvene as the Hospitality and Tourism Careers Oversight Group (HTCOG), chaired initially by Fáilte Ireland, to continue to support sustainable employment in the Hospitality and Tourism Sector. Fáilte Ireland will report on progress being made including their on-going work with the Department of Business Enterprise and Innovation on the availability of employment permits for the Tourism Industry.	FI, DTTAS, HTCOG, DBEI
		2019
10.	Tourist accommodation regulations will continue to be reviewed and updated to address changing visitor needs and expectations, and developments such as growth of the sharing economy. In particular, new and amended regulations for short-term tourism accommodation rentals and holiday camps will be prioritised.	FI, DTTAS
		2019
11.	The tourism agencies will review international policy and best practice in relation to accessible tourism with a view to identifying how Ireland competes internationally for the accessible tourism market. In order to attract more overseas visitors, Fáilte Ireland will initially pilot a programme with Local Authorities and local industry in the development of Ireland as a top-quality accessible tourism destination.	FI, TI, Local Industry, LA
		2019 - 2021
12.	Fáilte Ireland will examine existing and other potential quality assurance schemes in the accommodation sector and encourage participation from new and established tourist accommodation businesses.	FI
		2019 - 2021

ACTIONS

Research in the Irish Tourism Sector

No.	Action	Responsible Stakeholders
13.	The Central Statistics Office (CSO) has the lead role in the collection and publication of statistics on overseas and domestic tourism activity. The development of a Tourism Satellite Account for Ireland will be progressed by the CSO in order to enhance the understanding of tourism performance and its economic contribution to Ireland.	CSO, DTTAS, FI, TI
		2019
14.	The National Competitiveness Council reports to the Government on key competitiveness issues facing the Irish Economy. To supplement this valuable information, the tourism agencies will report annually to the TLG on the competitiveness of Ireland's tourism sector vis-a-vis its competitor set.	DTTAS, NCC, TI, FI
		2019-2021
15.	Fáilte Ireland, Tourism Ireland and the Central Statistics Office will continue to work together to identify additional sources of data and new tools that can be used to provide a better understanding of tourism trends and their impact on tourism performance.	FI, TI, CSO, DTTAS
		2019-2021

Supporting Local Communities in Tourism

No.	Action	Responsible Stakeholders
16.	The County and City Management Association (CCMA) will develop and roll out a Local Authority Tourism Officer Capability Programme to build tourism knowledge and key core capabilities/competencies. The Programme will utilise the biennial Local Authority Tourism Conference as a platform for sharing best practice and inspiring other community groups.	CCMA, FI, TI
		2019-2021
17.	Recognising the key role of the local community in tourism, Local Authorities will encourage and support community activation and participation in award schemes such as the 'Pride of Place' community programme.	CCMA, FI
		2019-2021

Wider Government Policy

No.	Action	Responsible Stakeholders
18.	Through its participation in interdepartmental fora, the Department of Transport, Tourism and Sport will continue to explore opportunities within the wider government policy environment to support sustainable tourism development. For example, as the focus for jobs in the tourism sector is on quality and competitiveness, the Department of Transport, Tourism and Sport will continue to advocate for this to be taken into consideration in the Government's Future Jobs Initiative.	DTTAS
		2019-2021
19.	The Department of Transport, Tourism and Sport, the operators of State and regional airports, and the tourism agencies will continue to work together to increase direct connectivity to Ireland within the framework of the Government's Aviation Policy. A particular focus will also be given to the quality of the visitor experience at our airports.	DTTAS, TI, FI, State and Regional Airports
		Ongoing
20.	Sporting and cultural events have contributed significantly to the success of Irish tourism. Major events will continue to be an important part of the Irish Tourism offering and the Government will ensure that the appropriate structures and supports are in place to attract flagship events which generate additional overseas tourism revenue and contribute to the promotion of Ireland.	DTTAS, FI, TI
		Ongoing
21.	Fáilte Ireland will continue to work with other state agencies such as the OPW and NPWS, through strategic partnership agreements, to optimise their assets for the benefit of tourists and maximise the potential contribution of their respective work programmes to the development of the tourism sector.	FI, OPW, NPWS
		2019-2021
22.	An accessible and efficient visa regime enables Ireland to attract visitors from emerging markets. Tourism Ireland and the Department of Transport, Tourism & Sport will continue to work in a co-operative manner with the Irish Naturalisation and Immigration Service (INIS) and the Department of Justice and Equality to progress any visa issues impacting on tourism and encourage the use of existing schemes such as the British Irish Visa Scheme.	TI, DTTAS, INIS, DJE
		2019

ACTIONS

International Context

No.	Action	Responsible Stakeholders
23.	A whole-of-Government approach is being taken in order to prepare and respond to Brexit. The Department of Transport, Tourism and Sport and the tourism agencies will actively contribute to and implement Brexit response plans and monitor the impact of Brexit on the sector.	DTTAS, FI, TI
		2019
24.	The Department of Transport, Tourism and Sport and its tourism agencies are members of various International Tourism Fora. A review of these memberships will be carried out with a view to maximising the benefits of membership for the sustainable growth of tourism in Ireland.	DTTAS, FI, TI
		2019

Co-ordination Structures

No.	Action	Responsible Stakeholders
25.	Building on the effectiveness of the strategic partnerships and strong working relationships established between the tourism agencies and other State agencies, Fáilte Ireland will establish regional co-ordination groupings with the objective of developing a consistent structured approach for co-ordinating tourism development activities that includes all key stakeholders in an appropriate/efficient way.	FI, TI
		2019-2021
26.	While acknowledging the operational and jurisdictional independence of the three tourism bodies on the island of Ireland, the development of a new mechanism for collaboration between the agencies has provided for a strategic framework to share insights and analysis and advance strategies that can provide mutual benefits for Ireland and Northern Ireland. Tourism Ireland and Fáilte Ireland will report to the TLG on an annual basis of the benefits accrued for Tourism in Ireland as a result of the tri-agency collaborative structure.	TI, FI
		2019-2021
27.	The Irish Government supports the continued work of Tourism Ireland as an organisation established in Strand Two of the Good Friday Agreement. The Government will, in consultation with the Northern Ireland Executive, continue to jointly examine and encourage projects and collaborations that can contribute to sustainable growth and the provision of mutual benefits to both jurisdictions. Fáilte Ireland and Tourism Ireland, in collaboration with DTTAS, will report to the TLG on opportunities for future collaboration or joint projects and will draw up a list of cross border operational issues for further exploration.	TI, FI, DTTAS
		On-going

APPENDICES



APPENDIX 1

Membership of the Tourism Leadership Group

Paul Kelly
CEO Fáilte Ireland

Niall Gibbons
CEO Tourism Ireland

Anna-Marie Delaney
Chief Executive Offaly County Council

Ruth Andrews
Chief Executive of the Incoming Tour Operators Association

James McGinley
Director McGinley Coaches

Stephen McNally
Deputy CEO of Dalata Hotel Group

John McQuillan
Technology Entrepreneur

Cormac Ó Donnchú
Founder of Experience Gaelic Games

Emma O'Brien
*Solicitor, Collins Brooks & Associates, Director of Clonakilty Chamber of Commerce,
Member of Cork Airport Development Council*

Deidre McGlone
Proprietor Harvey's Point Hotel

Ken Spratt
Assistant Secretary General, Head of Tourism and Sport, Department of Transport Tourism and Sport



© Tourism Ireland / Fáilte Ireland - Photographer: Chris Hill

APPENDIX 2

Glossary

BB	Bord Bía
BIM	Bord Iascaigh Mhara
CCMA	County and City Management Association
CSO	Central Statistics Office
DBEI	Department of Business, Enterprise and Innovation
DJE	Department of Justice and Equality
DTTAS	Department of Transport, Tourism and Sport
EI	Enterprise Ireland
FI	Fáilte Ireland
HSOG	Hospitality and Skills Oversight Group
INIS	Irish Naturalisation and Immigration Service
ITIC	Irish Tourist Industry Confederation
LA	Local Authority
NPWS	National Parks and Wildlife Service
NCC	National Competitiveness Council
OPW	Office of Public Works
TI	Tourism Ireland



© Fáilte Ireland



© Chris Hill



© Tourism Ireland – Photographer: Brian Morrison

Our aim is that we will have a vibrant, attractive tourism sector that makes a significant contribution to employment across the country, is economically, socially and environmentally sustainable, helps promote a positive image of Ireland overseas, and is a sector in which people want to work.

Department of Transport, Tourism and Sport
Leeson Lane, Dublin, D02 TR60
Phone: + 353 1 670 7444

www.dttas.gov.ie