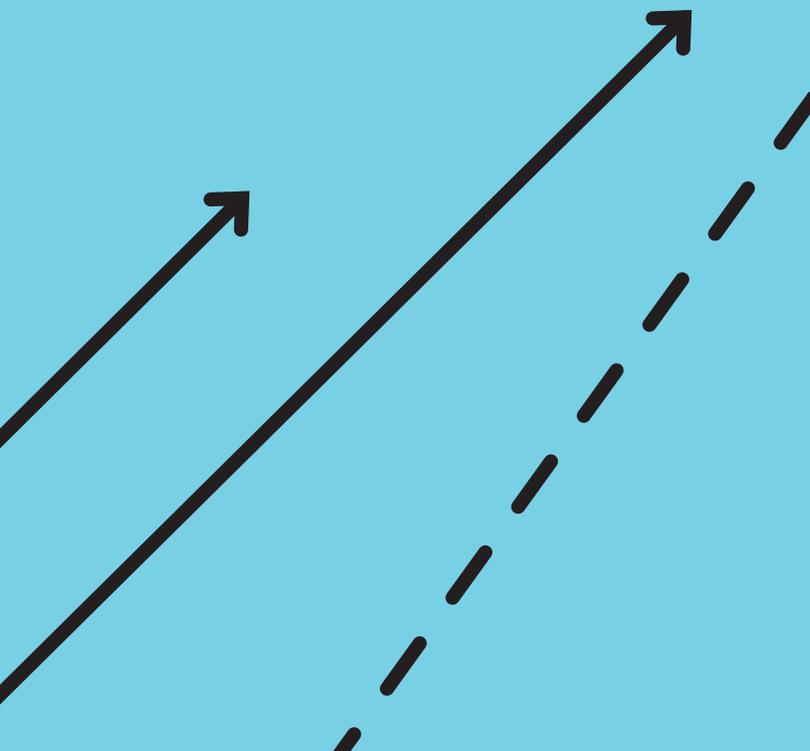


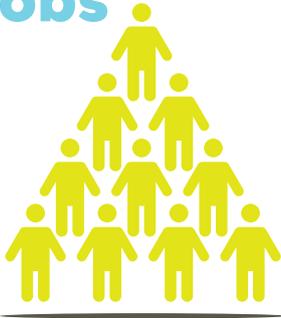
AMBITION

TOURISM 2025

An Industry Roadmap for Growth



230k Jobs



Tourism's Potential for Ireland

Spending by international tourists when in Ireland has grown by almost 40% since 2013, creating 40,000 new jobs in the process and delivering an additional €700 million to the Exchequer. Ireland generated a record €4.7 billion from overseas tourists in 2016, with a further additional €1.5 billion earned by Irish air and sea carriers from tourists' fares.

“The increase in tourism has far exceeded forecasted expectations.”

The increase in tourism has far exceeded forecasted expectations. This is down to the competitiveness and quality of the Irish tourism product however prevailing winds including sustained expansion of air services into the country and a weak euro have helped growth.

The challenge is to sustain the growth trend beyond 2017 and avoid a return to peaks and troughs of previous economic cycles.

Tourism, Ireland's largest indigenous employer providing 230,000 jobs nationwide, can never be off-shored or out-sourced.

It is here to stay. It has definitively proven its contribution to Ireland's continued economic recovery, creating jobs and delivering economic activity at national and local level. No other industry can claim to provide such regional balance.

A New Tourism Strategy; industry-led and government-enabled

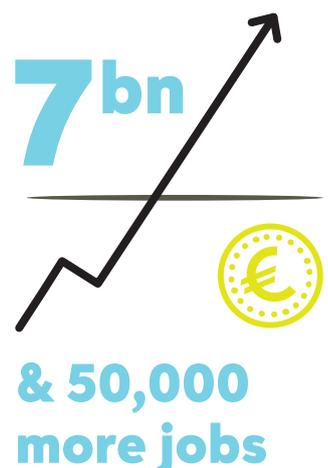
The Government policy for tourism published in March 2015, 'People, Place and Policy- Growing Tourism to 2025', set a target of 10 million overseas visitors spending €5 billion annually by 2025 with employment reaching 250,000. At the time of publication ITIC stated that the targets lacked ambition. It is now time for a new strategy to be put in place.

“It is high time that more ambitious national targets are put in place for an industry that is so vital to Ireland's economy.”

It is clearly evident, due to strong recent growth, that the national targets could be achieved as early as 2017 or 2018. A 6% annual growth rate over the next two years would see the 2025 targets easily breached.

It is high time that more ambitious national targets are put in place for an industry that is so vital to Ireland's economy and that the state supports such targets through appropriate resources allocated to product development and destination marketing. To that end ITIC is advocating a new strategy for tourism that is industry-led and government-enabled with stretching growth aspirations for a sector with significant potential.

ITIC believes that with the right government support, the tourism industry can aim to increase the value of tourism export earnings by 50% to €7 billion annually by 2025. This would create a further 50,000 jobs nationwide.





A Confident Tourism Industry

The international travel market is enjoying some powerful trends which continue to drive demand at a faster pace than economic growth. Ireland needs to compete more aggressively if it is to continue to gain market share and see sustainable growth for tourism. It is now time for the Government to match the Irish tourism industry's ambition for the sector.

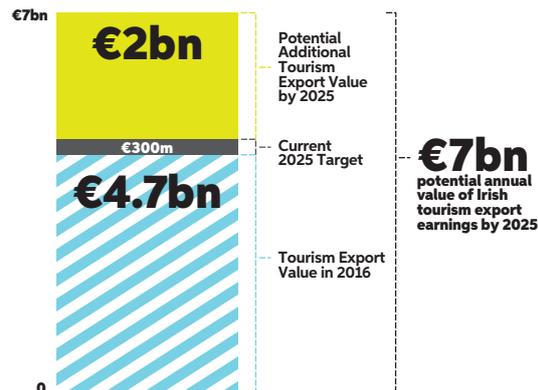
“The future is bright for Irish tourism.”

Despite the significant challenges of Brexit and maintaining competitiveness, Irish tourism must be confident about its future assuming correct policies are followed and appropriate investment strategies pursued. The quality and depth of the Irish tourism product, our strong brand positioning in key source

travel markets, the fact that Ireland is home to Europe's largest low cost airline and is now connected – through Aer Lingus as part of IAG – to a global marketplace means that the future is bright for Irish tourism.

A New Growth Vision & Bold Strategy for the Next Decade

Tourism's growth though cannot be taken for granted and requires a new shared vision between the state and industry if the sector is to realise its full potential. A new growth aspiration, with revised and ambitious targets, is required to realise the sector's full potential.



ITIC calls upon the Government to enter into a new partnership with the industry for a shared strategic vision and refocus efforts on sustaining growth to capitalise on extensive opportunities.

ITIC believes that it is realistic to aspire to achieving the following growth projections by 2025:

- Aim for a 50% increase in the value of tourism export earnings to €7 billion annually.
- The creation of at least 50,000 new tourism-sector jobs.
- Increase market diversification and grow visits from high-value source markets.

To achieve this and realise the significant economic benefits for the country requires the Government to match the tourism industry's ambition by adopting a 10 point plan for sustained growth

1. Concerted and sustained efforts to improve competitiveness and capacity.
2. Immediately restoring the destination marketing budget for Ireland to pre-recession levels – this requires a €20 million budget injection followed by annual inflation-matching increases.
3. Allocating a fair and proportionate capital budget for tourism product development. ITIC estimates this at being circa €350million over the next 5 years to be allocated in a multi-annual fund.
4. Encourage increased market diversification.
5. Development of a new identity for the Midlands/Shannon area currently not well-served by Ireland's Ancient East nor part of the Wild Atlantic Way.
6. Cohesive 'joined-up' business led strategies involving carriers, tourist providers, and intermediaries in targeting market opportunities and delivering results.
7. A Brexit fund to ensure that Ireland's market share from Britain is protected while equally looking to diversify into new international source markets.
8. Establishment of a Brexit tourism taskforce to ensure that Irish tourism's interests – namely aviation access, the common travel area, regulatory regimes and cross-border co-operation – are secured in any future EU-UK trading deal.
9. Foster the capacity of the industry to deliver differentiated visitor experiences by developing the people skills base of the sector.
10. Such a revised strategy should be steered by an independently-chaired Tourism Leadership Group peopled by industry and agency practitioners, with 3 year reviews.

ABOUT ITIC

The Irish Tourist Industry Confederation (ITIC) represents the leading tourism interests and businesses throughout Ireland. Through independent research, analysis and interpretation ITIC aims to help the tourism sector realise its full potential.

ITIC is advocating a new tourism strategy that is industry-led and government-enabled with ambitious growth targets for a sector with such proven potential.

ITIC believes that with the right policies and investment strategies it is realistic to aspire to achieving the following growth projections by 2025:

- **Aim for a 50% increase in the value of tourism export earnings to €7 billion annually.**
- **The creation of at least 50,000 new tourism-sector jobs.**
- **Increase market-diversification and grow visits from high-value source markets.**

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(Association of Irish Professional
Conference Organisers)

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Irish Hotels Federation

Jameson Visitor Centres

Office of Public Works – Heritage

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Shannon Group plc

Stena Line

Tourism Ireland

Vintners' Federation of Ireland

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