

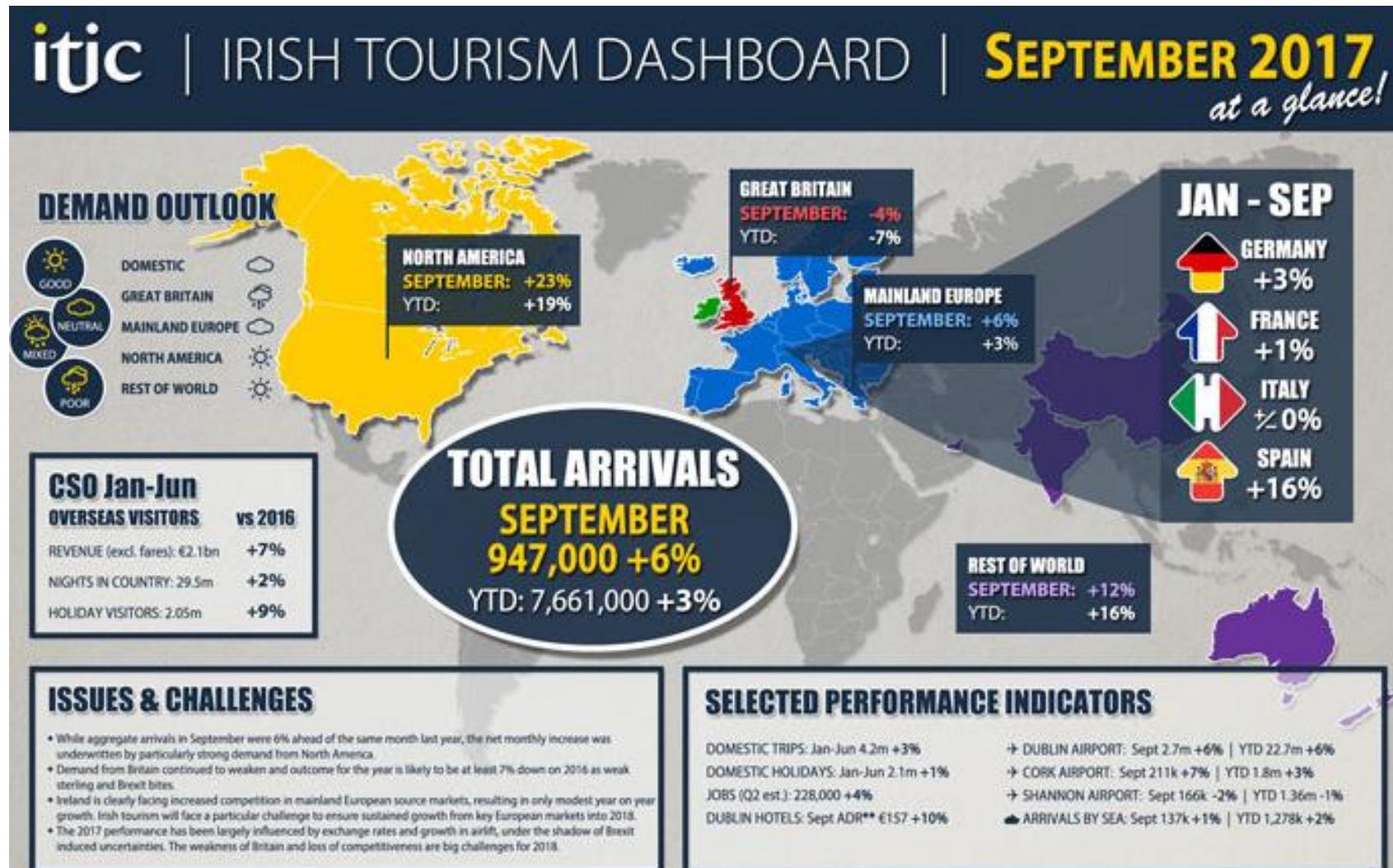


Leading our tourist Industry

Annual Tourism Policy Workshop

**Dromoland Castle
November 2017**

“The Good, the Bad and the Brexit”



“The Good”: Growth & Jobs

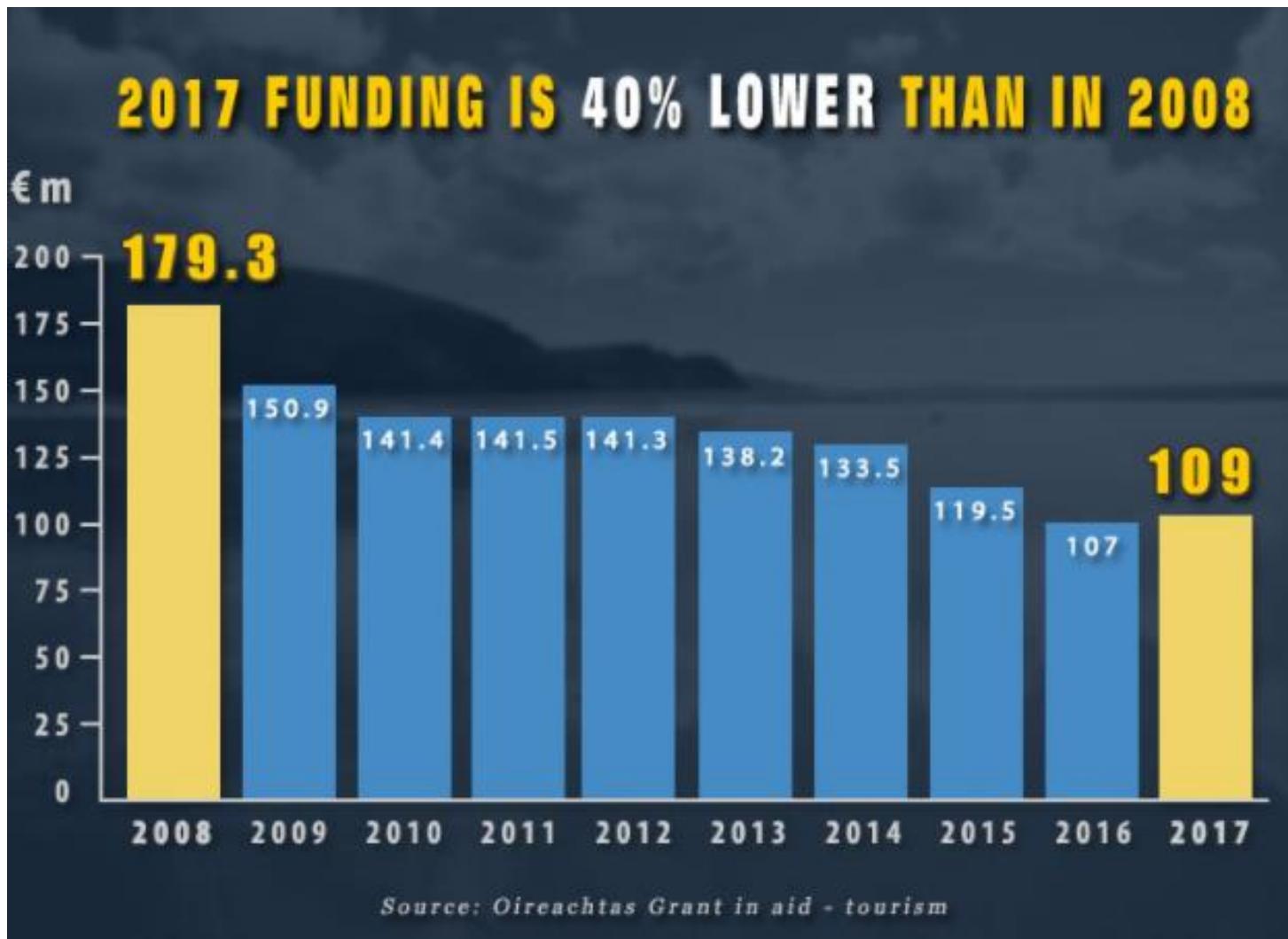


“The Good”: Growth & Jobs

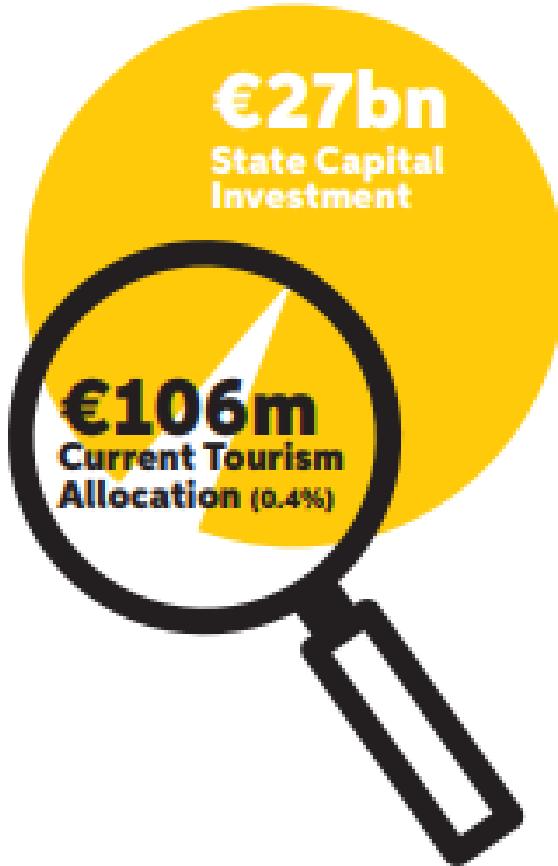
Impact of total job creation
in tourism Q2 2011 to Q1 2017
(ITIC estimates derived from CSO and Fáilte Ireland data)

Regions	Q2 2011	Q1 2017	Jobs Growth
Border (Cavan, Donegal, Leitrim, Monaghan, Sligo, Louth)	18,900	25,800	6,900
Midland (Laois, Longford, Offaly, Westmeath)	11,100	11,550	450
West (Galway, Roscommon, Mayo)	17,700	23,700	6,000
Dublin (City and County)	43,350	70,650	27,300
Mid-East (Kildare, Meath, Wicklow)	17,850	20,850	3,000
Mid-West (Clare, Limerick, Tipperary North)	15,600	18,150	2,550
South-East (Carlow, Kilkenny, Tipperary South, Waterford, Wexford)	17,400	23,100	5,700
South-West (Cork, Kerry)	29,700	34,800	5,100
Total Tourism Jobs	171,600	228,600	57,000

“The Bad”: Government Funding

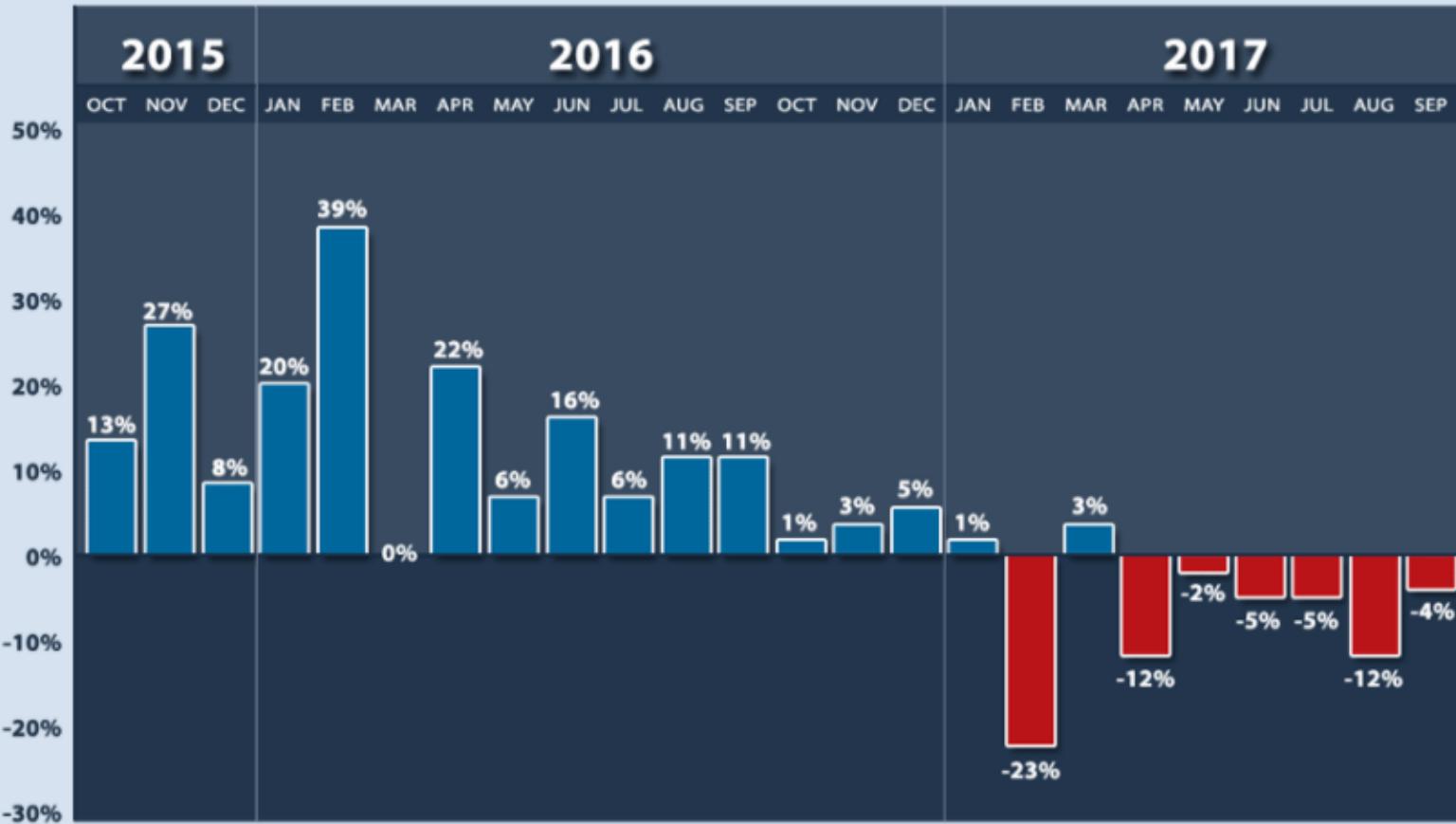


“The Bad”: Government Funding



“The Brexit”: declining GB

BRITISH VISITOR MONTHLY PERFORMANCE Oct 2015 - Sept 2017



Source: ITIC estimates derived from CSO data

“The Brexit”: 4 key area of any new EU-UK deal

- 4 key areas of concern to Irish tourism
 - Common Travel Area
 - Aviation Open Skies
 - Harmonised regulatory regime across island
 - All-island marketing

Tourism 2025+: An Industry Strategy for Growth

- To Develop A Strategy:
 - by the industry, of the industry, for the industry
- To Deliver A Strategy:
 - that is industry-led, Government-enabled, Agency-supported

An industry strategy with 10 pillar themes each with recommendations

Competitiveness

Access & Capacity

Capital Investment

Destination Marketing

Market Diversification

Brexit Challenges

Skills & Training

Regionality & Seasonality

Regional Brand Experiences

Organisational Structures



Leading our tourist Industry

Thank You

www.itic.ie

@EoghanOMW
@Irishtourismind