

Putting Northern Ireland on the Global Stage



A global footprint

14

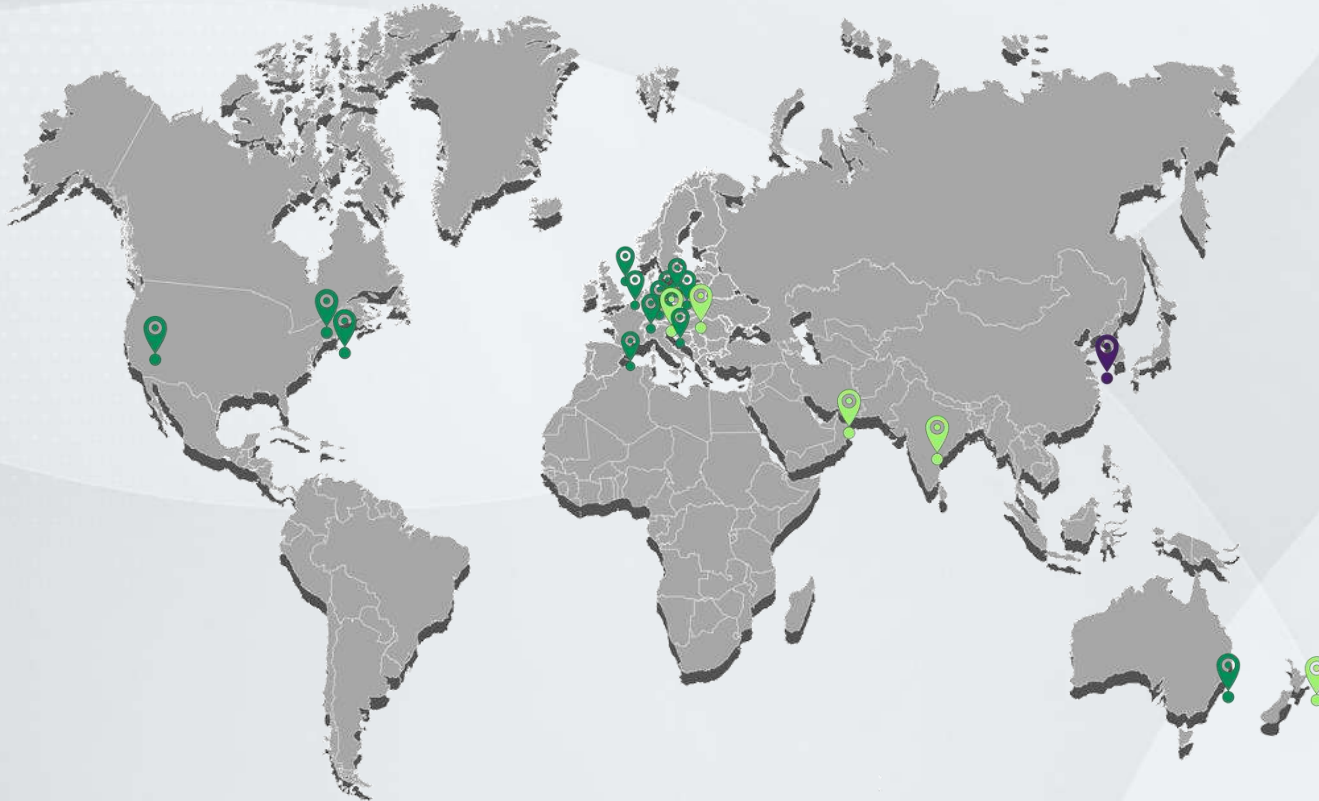
OFFICES

15

MARKETS

5

REPRESENTATIVES



Great Britain
London
Glasgow



Nascent Markets
Shanghai



Mainland Europe
Frankfurt
Paris
Milan
Madrid
Amsterdam
Copenhagen
Brussels

Representatives
Switzerland
Austria
India
UAE
New Zealand



North America
New York
San Francisco
Toronto



Australia
Sydney

Northern Ireland: Growth & ambition

~10X

Interest in visiting from overseas since 2002

~100%

Growth in annual overseas visitor spend 2025 vs 2010

+100%

Ambition for overseas visitor revenue by 2035

2035

£1.3bn

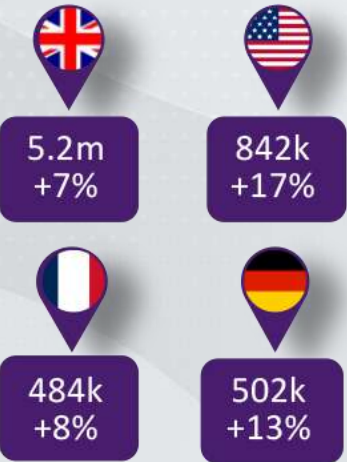


+6.5% on average each year to 2035

Strengths in tourism

Connectivity – winter 2025 / 2026

TOP 4 MARKETS



11.8m INBOUND AIR SEATS AVAILABLE



GB
5.2m
+7%



Mainland Europe
5.1m
+14%





North America
901k
+16%



Other Areas
614k
+34%

12% YoY GROWTH

 **42**
Airlines

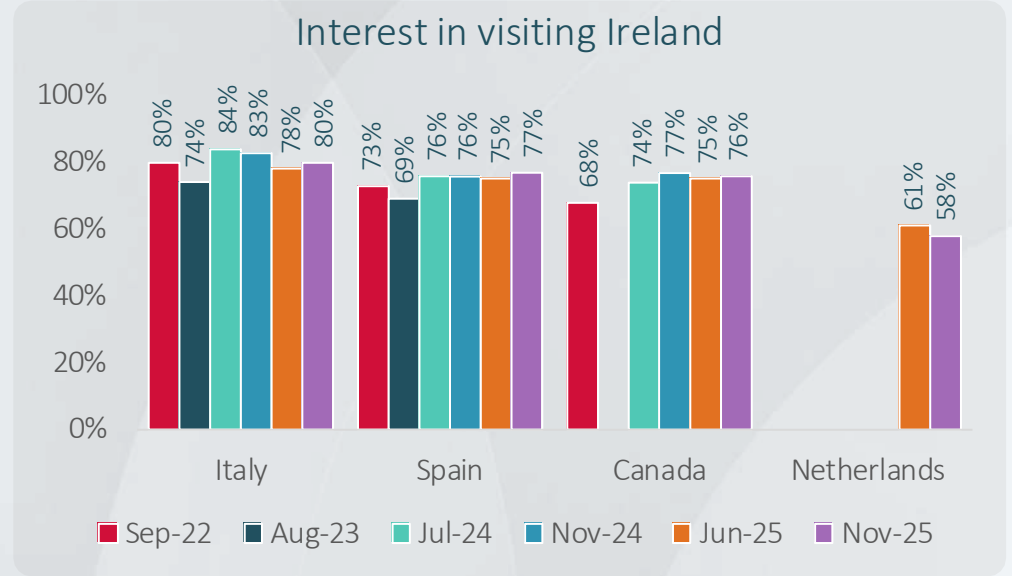
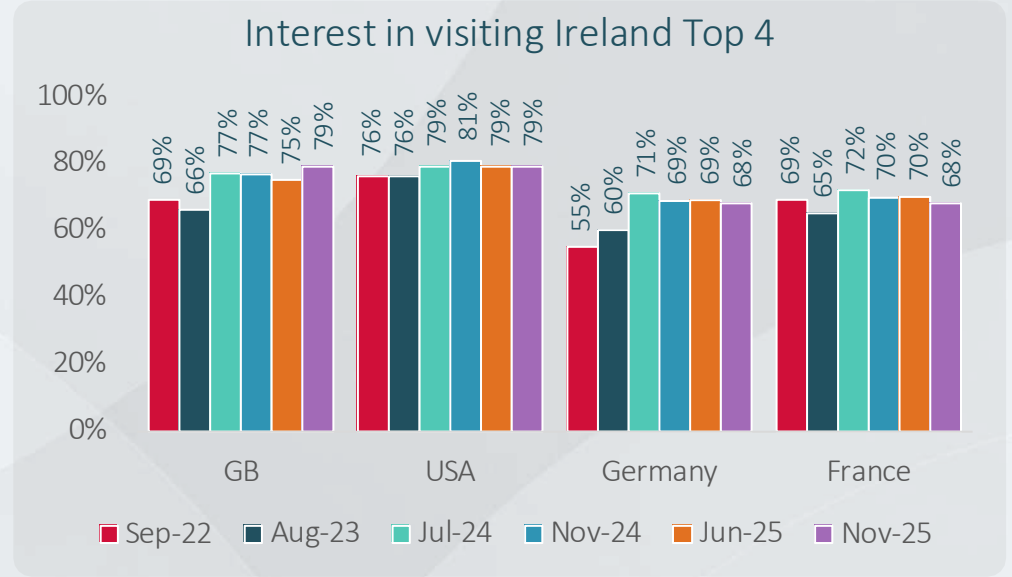
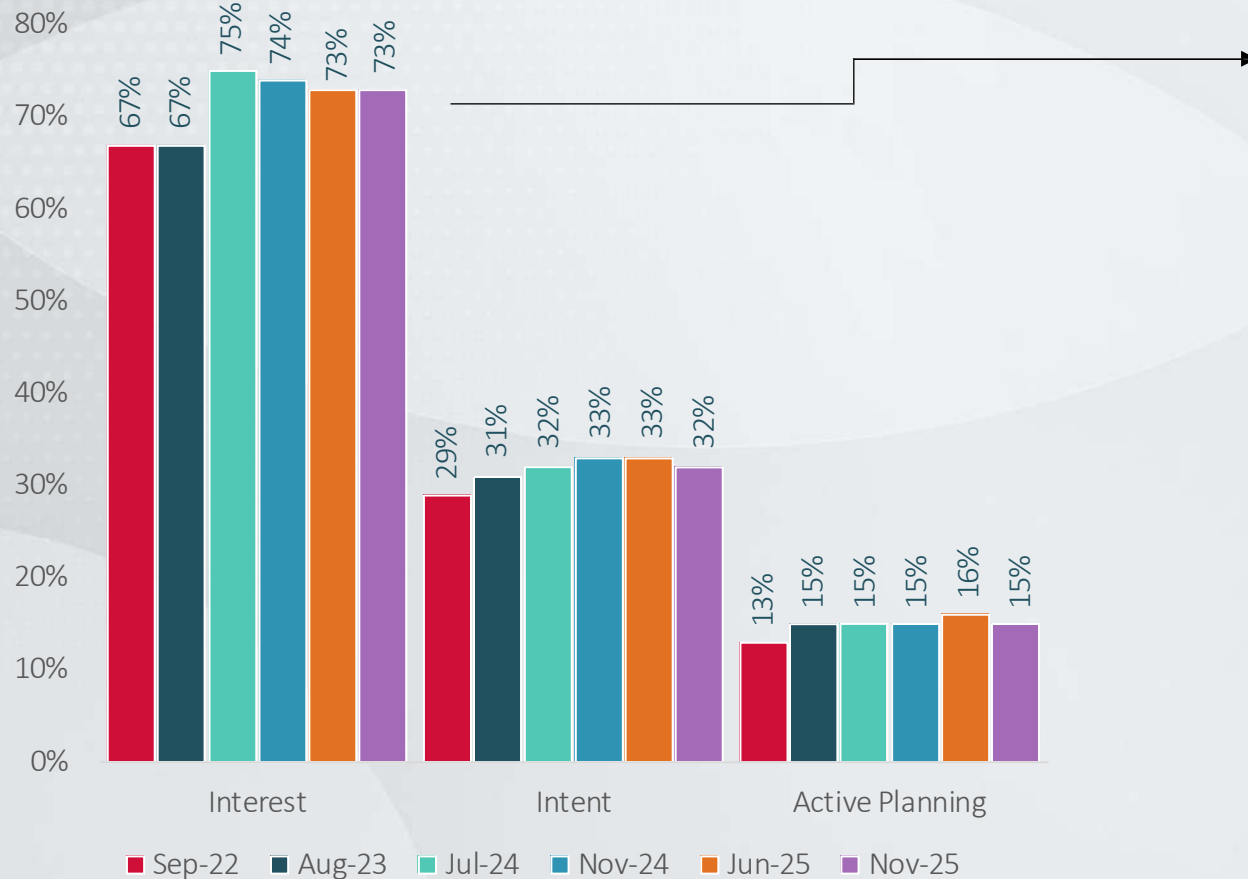
 **179**
Overseas Airports

 **9**
IOI Airports

Interest, Intent and Active Planning in visiting Ireland remain stable outside of peak season

Funnel Performance (Top 4) – Interest

Funnel in Top 4 markets



Q. "Which best describes your intention, if any, to visit the below destinations for a holiday or short break?"

(Base: All Overseas Holidaymakers; Nov-25; n=8,065)

Uncertainty is the new certainty

'Too much uncertainty to book right now'



'An international holiday is worth the money'



Changes and challenges

- Market concentration
- Cost of doing business
- Competitiveness



2026-2028 Tourism Ireland Corporate Plan



Competing to Win: strategy

Win value-adding visitors
to the island of Ireland, benefitting business,
communities and place



Grow strategic
source markets



Compete to win
value-adding
visitors



Grow businesses and
economies year round,
in Northern Ireland
and regions



Strengthen go-to
market with
partnerships of
the future

Strong
foundations
underpinned
by:

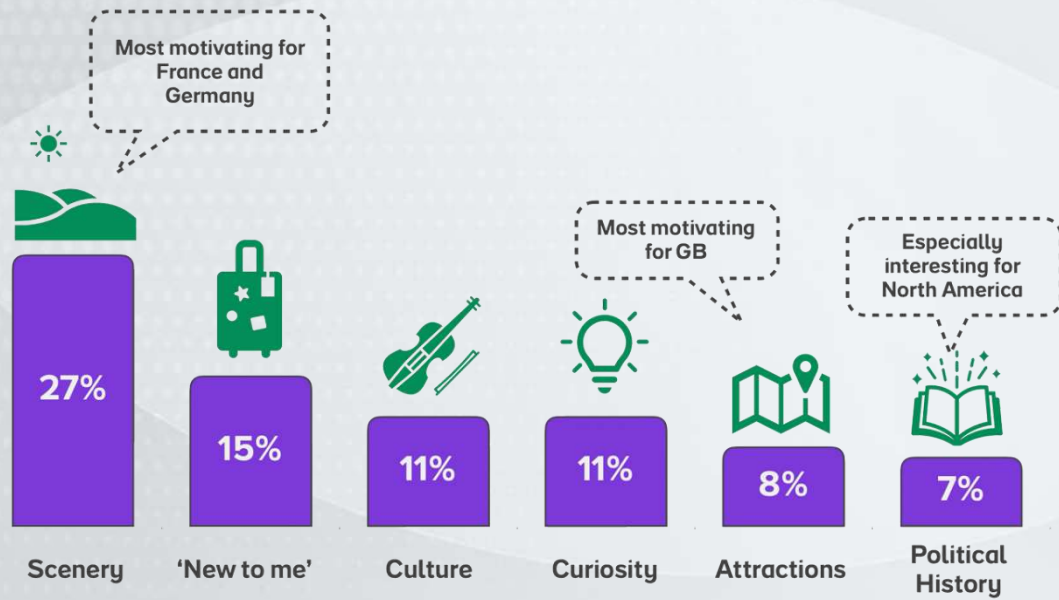
Sustainable tourism respecting communities and place

World-class team, innovating for impact and living our values



**Win value-adding
visitors**

Reasons visitors consider Northern Ireland



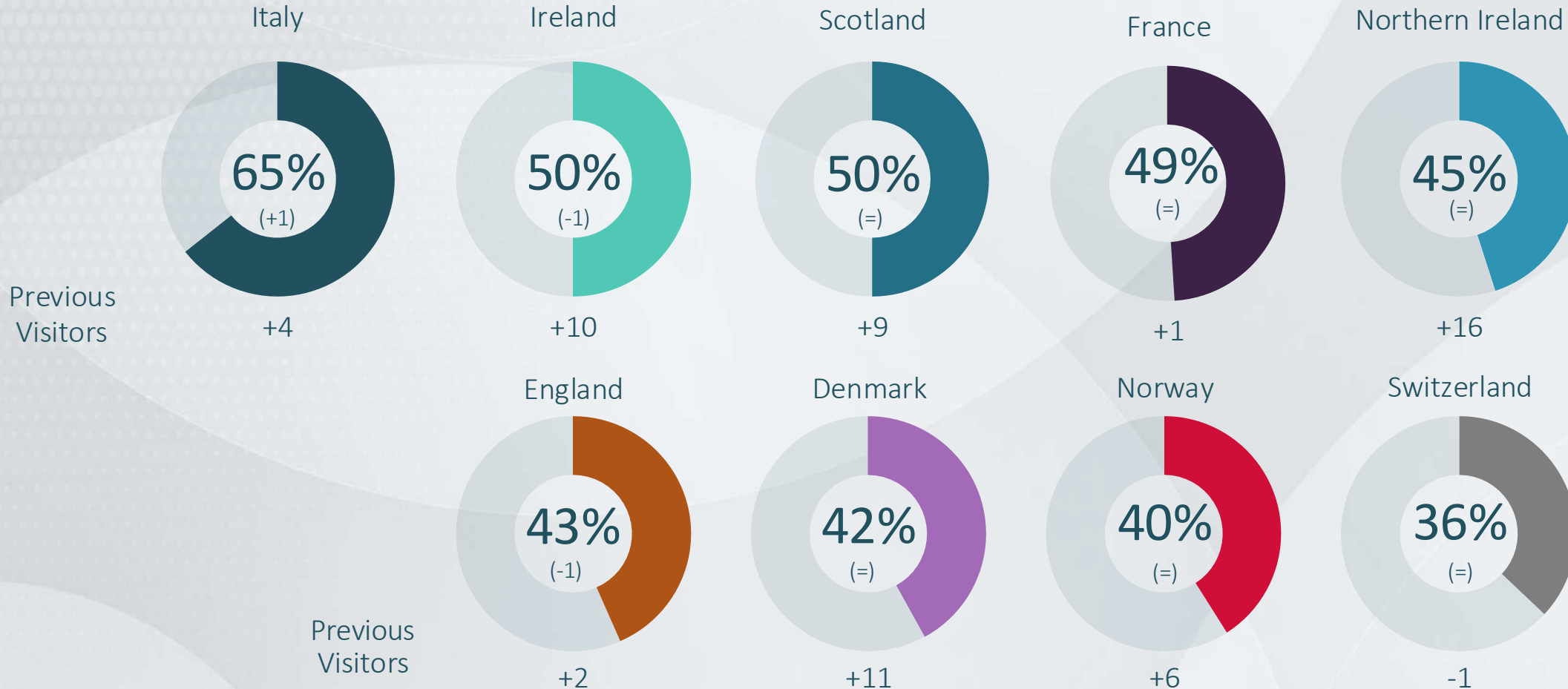
Exploration of scenery, culture, history, sights are reasons to visit



Around half expect to find good value for money - experience improves perceptions

All destinations are stable in value for money perceptions versus June 2025.

Destination Image Perception – Value For Money – NET: Agree



() = difference vs. Jun-25
 Q. "How strongly do you agree or disagree with each of the following statements about ..."
 (Base: All Overseas Holidaymakers (excl. NL); Nov-25; n=7,056)



Visit the island
that goes beyond

• ———  Ireland.com ——— •





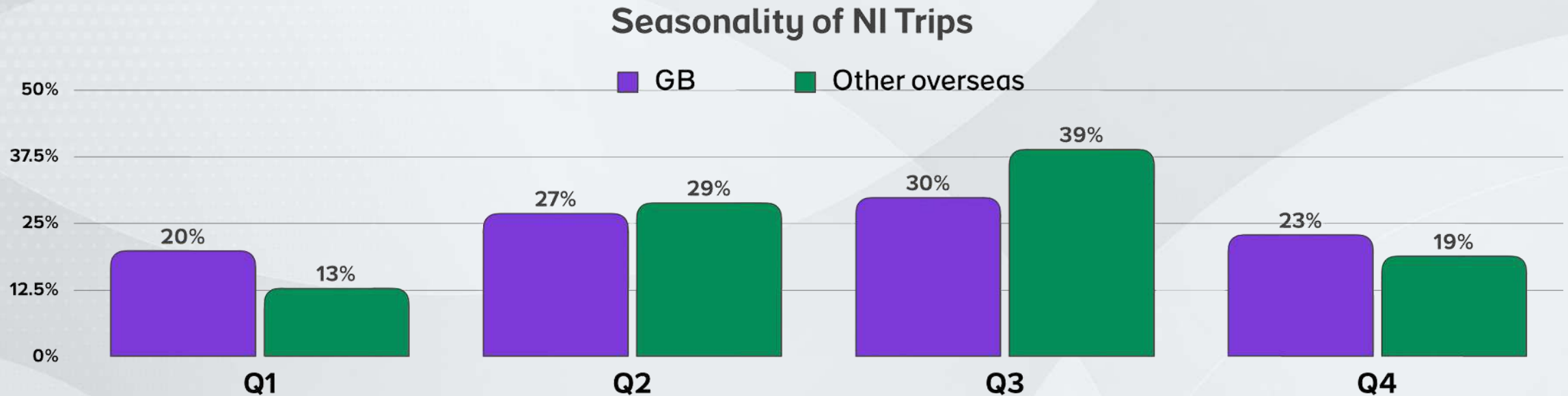
Grow strategic source markets

Deepen and defend the US

- Year-round campaigns
- Supporting new gateways
- More industry opportunities
- America 250



Grow Great Britain from strong foundations



2026: exciting programme of marketing to inspire visitors across regions and seasons

New Mainland European strategy

62% of Mainland Europeans interested in visiting NI some time

- 450m people on our doorstep
- Strong air and sea access
- Multiple holidays every year
- Invest to elevate perceptions

Goal:

Grow revenue by +50% by 2031



2026-2031: step-change of visitation from Mainland Europe

ELEVATE BRAND IRELAND

Invest in reaching Europeans and showing the island of Ireland is more than 'worth it', including culinary tourism focus.



VISITOR-LED 'PLUS-ONE' STRATEGY

Visitor-led approach to achieve value-adding tourism by encouraging visits based on access and interest, greater spread and duration.

ALL MARKETS

Year round
Second/third holiday focus
(c. 5 nights)
Plus-one location

GERMANY AND FRANCE

Longer stay across
island of Ireland



Mainland Europe – Plus One Strategy





Business & Incentive Tourism



Value of Business Tourism

- Annual Revenue of €1Bn +
- Supports 22,000 jobs
- Increased spend of x2.5 leisure visitors
- Drives mid-week and off-season high value business



Headline Shows 2026



IMEX Frankfurt – May
IMEX America, Las Vegas - Oct



IBTM, Barcelona - November



**Around
6000
Business
Meetings**

Key Tourism Ireland Led Activities



- St Patricks Day Networking Reception (US)
- California Roadshow (US)
- Frankfurt & Cologne Workshops (GER)
- Lunch and Learn; Paris & Lille (FR)
- Pre-IMEX Meet In Ireland Golf Event (US)
- Ireland Meets the West End (GB)
- Lunch & Learn Nice, Marseille, Lyon (FR)
- X6 Business Events Fam Trips



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5000
Business
Meetings



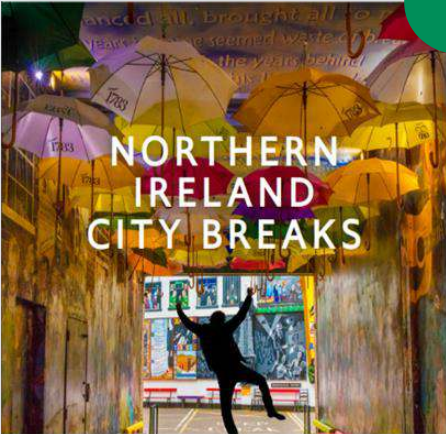


Key Channels: NI on the Global Stage

Tourism Ireland: Key Channels



1



3

ALL BRITISH AIRWAYS HOLIDAYS PACKAGES
INCLUDE FREE CHECKED BAGGAGE UP TO 23KG PER PERSON.

FLIGHTS + 2 NIGHTS HOTEL FROM **£179** PP

Book now at ba.com/northernireland

BRITISH AIRWAYS HOLIDAYS

FEEL YOUR HEART WITH Ireland

Prices are subject to change and availability. Price stated is per person based on 2 adults sharing, exclusive of all airport taxes, fees and charges (seasonal restrictions may apply).



2



4



5

Northern Ireland on Screen

Dermot's Taste of Ireland

Martin and Roman Kemp TV series

How to get to heaven from Belfast



itv



4



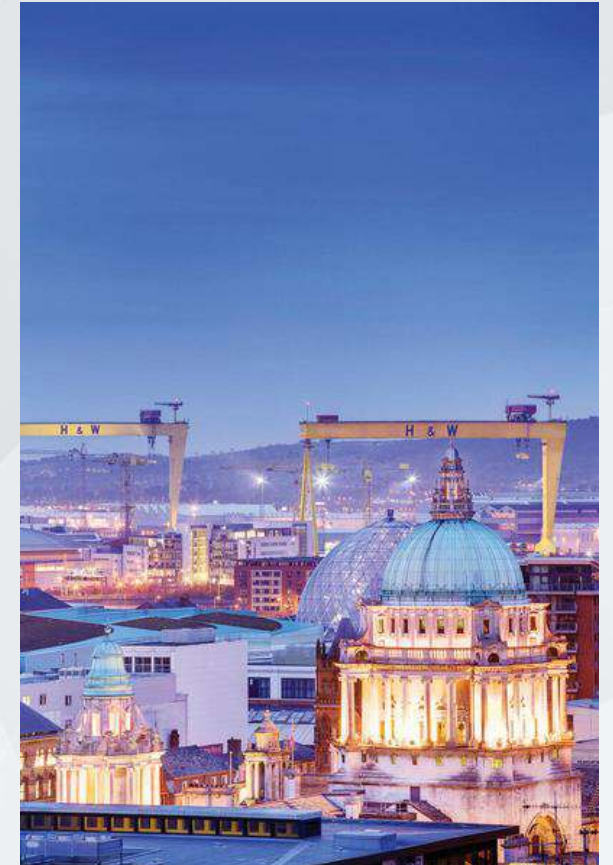
NETFLIX

HOW TO GET TO HEAVEN

Key Campaigns



Home of Halloween



Gateway Cities

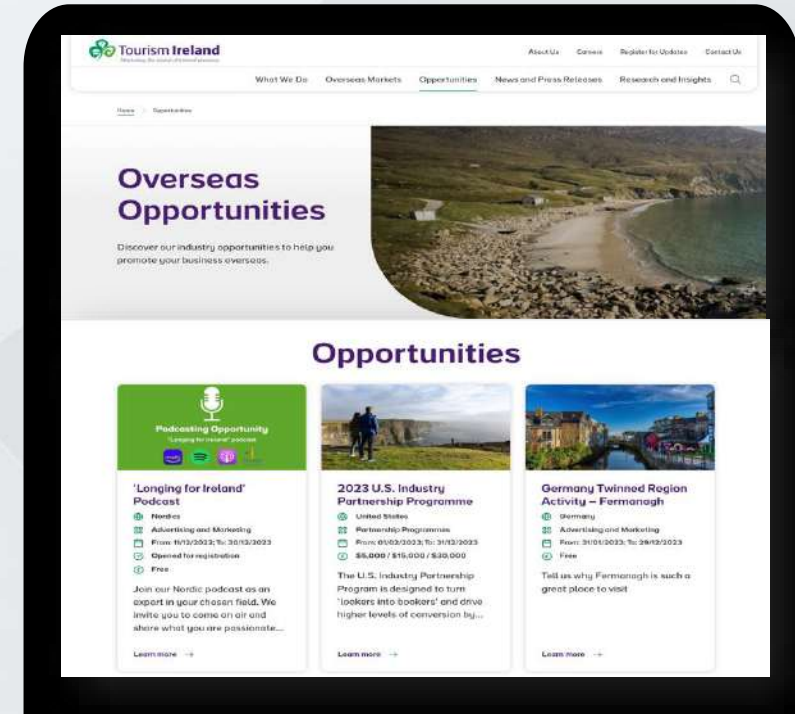
Key NI Focus



Industry Opportunities

- **Register on the Industry Opportunities website for updates and alerts**

- **Share your updates and social content with us via industryopportunities@tourismireland.com**





 Tourism Ireland

Thank You

A scenic photograph of a stone bridge in a forest during autumn. The bridge is made of large, moss-covered stones and has a small archway. The ground is covered in fallen red and orange leaves. The trees in the background have vibrant autumn foliage. A wooden sign in the foreground identifies the bridge.

Foley's bridge
1787