Breakfast Bytes November 16th, 2026



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Dublin Breakfast Bytes

Ciara Sugrue,

Head of Product & Regional Development, Dublin

Fáilte Ireland

Dublin

Fáilte Ireland Internal Content

Dublin Strategic Objectives

- Increase length of stay
- Optimise mix and revenue
- Differentiating experiences & dispersal to stay longer and spend more
- Develop destination Dublin



What will Dublin, Product & Regional Development focus on for 2027….

Development

City DEDP projects

Mountains DEDP commencement

Coast DEDP commencement

Culture proposition

Culinary Tourism

Destination Dublin

Dublin City Taskforce

Dublin's positioning

Dublin champions

Dublin breakfast Sessions

Seasonality

Winter in Dublin

3-day New Year's Festival

Dublin's Nighttime Economy

Industry Capability

Continued supports in areas of importance for your business (Sales, marketing, AI, B2B conversion, B2C conversion, inclusivity / accessibility, sustainability)

Leveraging large events

Saint Patrick's Festival

Concerts: Croke Park/Aviva American College Football / Pittsburg vs Wisconsin

The Ryder Cup

Home of Halloween

Underpinned by alignment and partnership with our 4 local authorities









Thank you

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Additional tools and follow on…

Your Reputation for Value toolkit

Strengthen how your business creates, communicates, and delivers value.

Download the toolkit that includes:

- A value action checklist for busy teams
- Steps to identify your target customers
- Guidance on pricing with confidence
- Tips to communicate value, not just price
- Ideas for upselling, cross-selling, and added revenue
- Ways to turn customers into advocates



2026 – Quarterly business of tourism report

Download here full report











Thank you

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Turning Great Experiences into Better Value

What domestic visitors want and how tourism businesses can respond

Breakfast Bytes| November 2026

Caroline Flannery, Manager – Visitor & Demand Insights
Fáilte Ireland

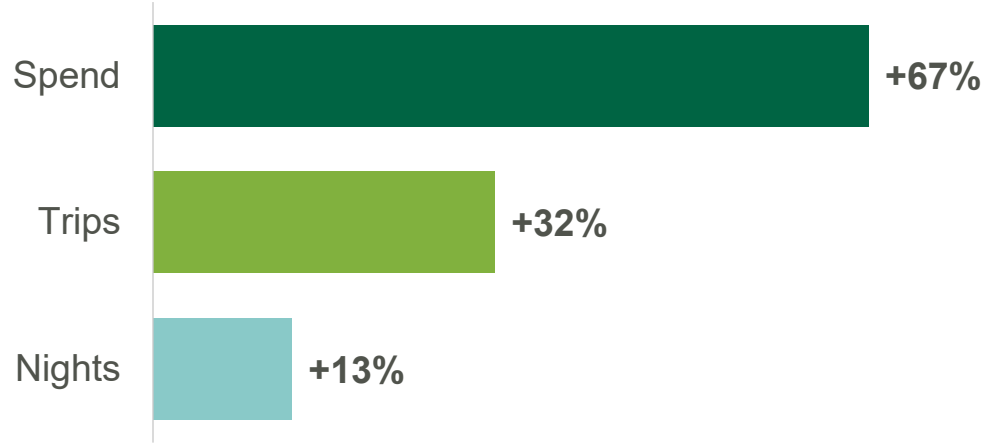


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Domestic spend has grown twice as fast as trips since 2019

Fewer, higher-spend trips: the market has grown in value, not volume.

Domestic overnight tourism, % change 2019–2025



€3.6bn
domestic overnight spend, 2025

+8%
domestic spend in H1 2026, on trips +4%

–3%
daily holiday spend in H1 2026



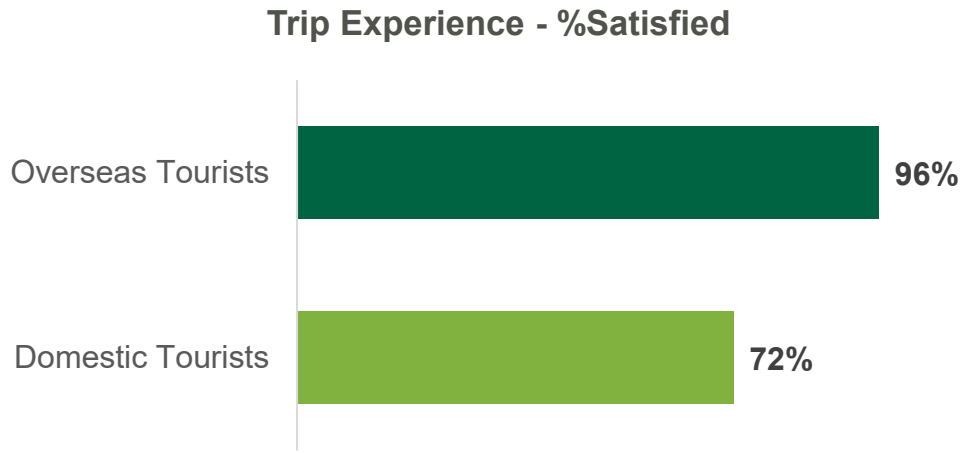
€5.7bn
Overseas tourists trip in 2025, excluding fares. Spend reduced by -8% versus 2024.

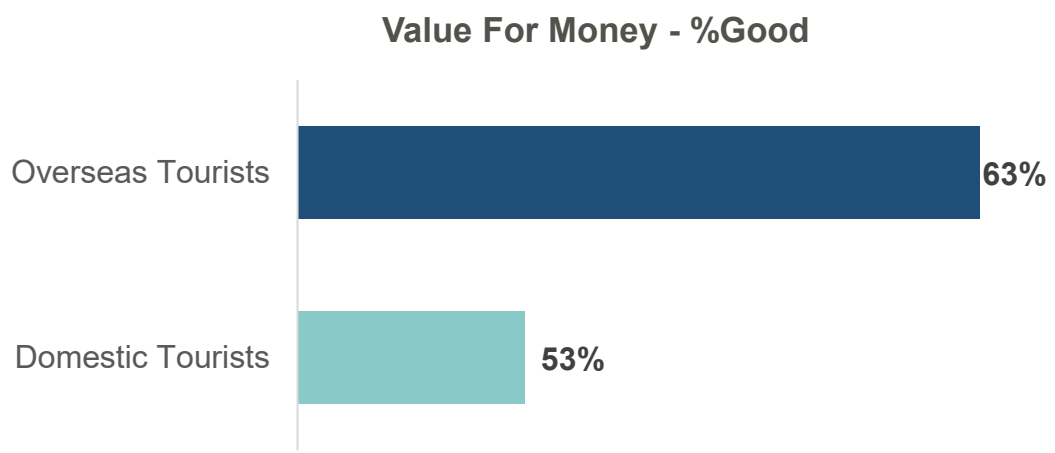
Source: CSO Household Travel Survey; Irish Tourism Quarterly Economic Update, October 2026

Fáilte Ireland Restricted Content

Despite this, value for money ratings are lagging behind satisfaction

Value for money ratings among both visitor types lag behind satisfaction levels







The gap is widest among domestic tourists. Demonstrating value beyond price is crucial for this audience in the current economic climate.

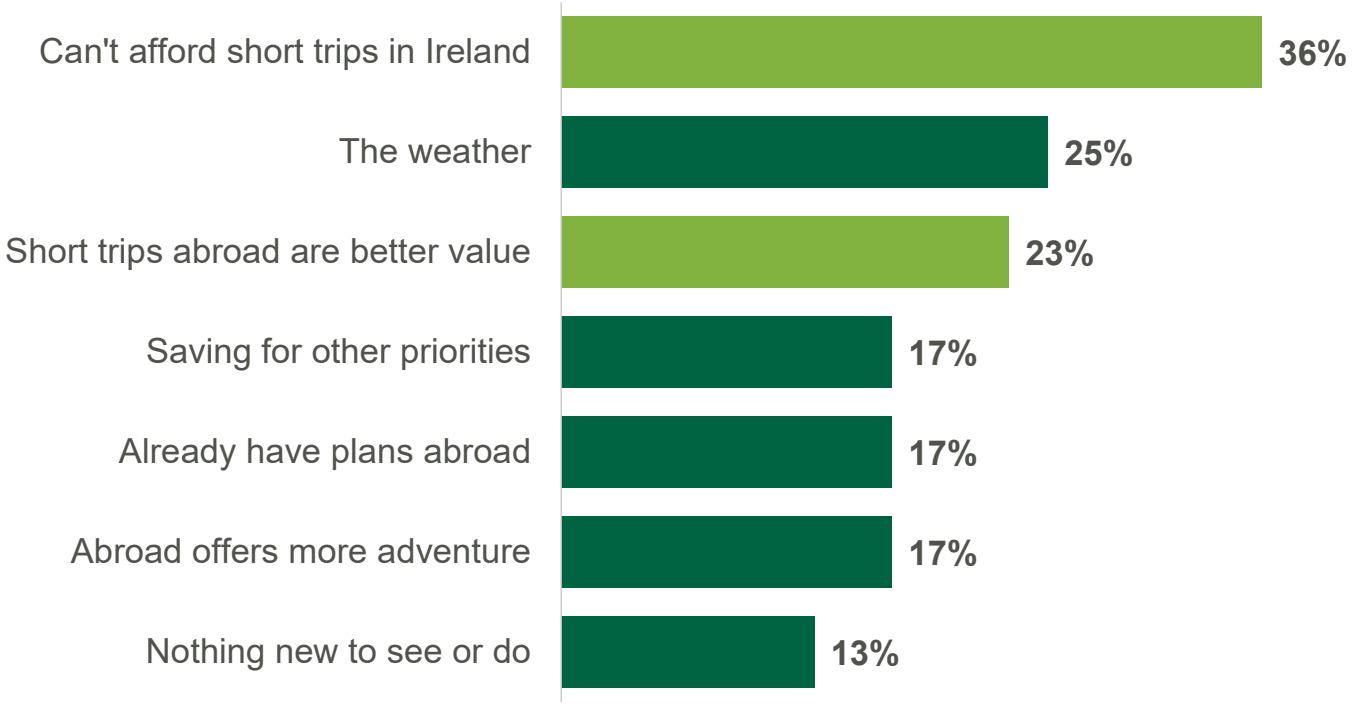
Source: Fáilte Ireland Business of Tourism Report, 2026

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Perceived affordability is a key barrier to taking a domestic trip

Irish consumers judge a break at home directly against going abroad.

Why people won't consider a short break in Ireland in the next 12 months (%)





There is an opportunity to challenge these perceptions by **showcasing** the **tourist experiences that cannot be found elsewhere**, especially overseas.

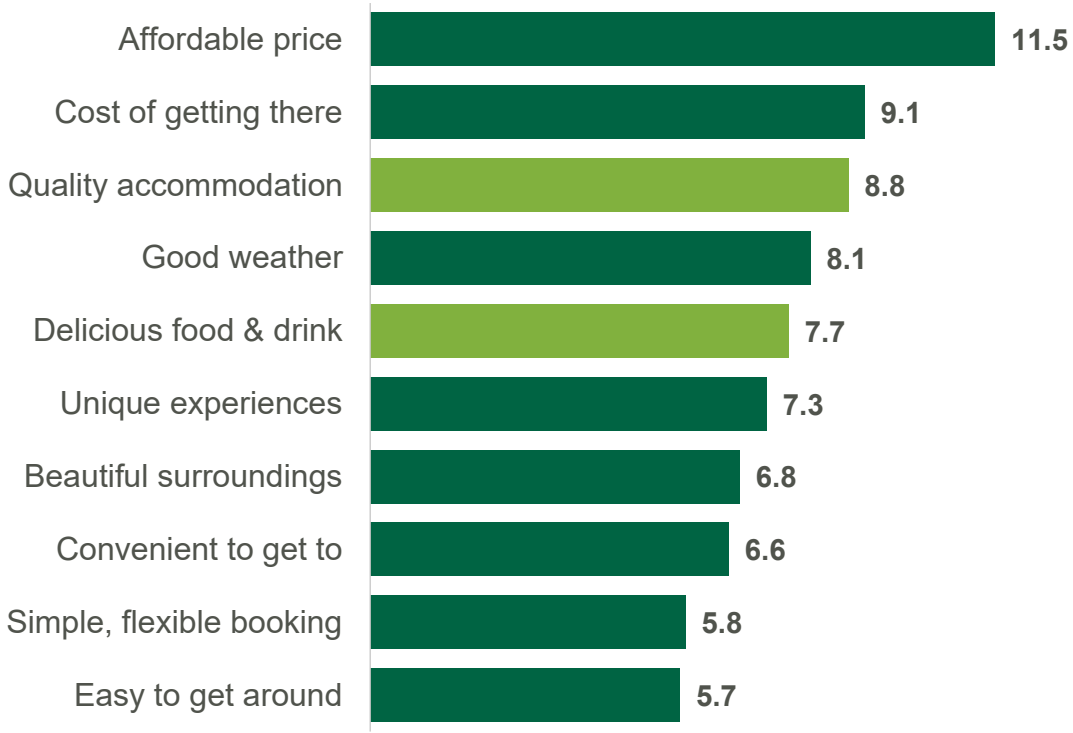
Source: Fáilte Ireland Consumer Update Peak Season Toplines 2026 (n=731 not considering a trip in ROI); Fáilte Ireland Domestic Tracker.

Fáilte Ireland Restricted Content

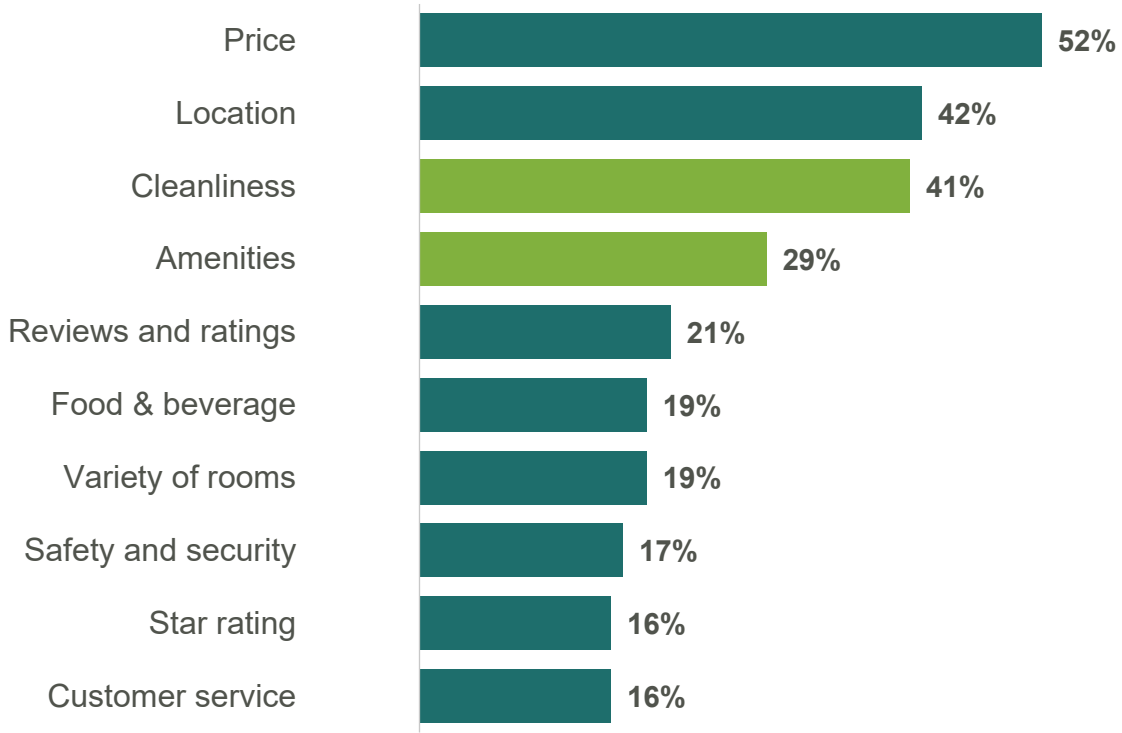
Beyond price, value is influenced by the full trip experience

Quality accommodation and food drive value; cleanliness and amenities decide between properties.

What drives a sense of value (importance score)



Top-3 factors when choosing between properties (%)



Source: Fáilte Ireland consumer research 2026, unweighted base n=913.

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Reduced effort leads to higher satisfaction and value perceptions

Reducing the level of customer effort both before and during their trip is worthwhile.

Which parts of the trip required more effort than you expected (%)



46%

Agreed that "It felt easy for me to have the holiday I wanted in Ireland"



Identify **potential pain-points** for the customer in advance of their trip. Prepare possible **alternative choices** of activities or itineraries.

Source: Fáilte Ireland Domestic Tracker: Sept and Oct 2026 (1,487 domestic tourists)

Fáilte Ireland Restricted Content

The more tourists do on a trip, the more satisfied they are.

Domestic leisure breaks by satisfaction and value-for-money rating.

	LOW VALUE FOR MONEY	HIGH VALUE FOR MONEY
HIGH SATISFACTION	**23%** Happy with the trip, unconvinced by the price	**50%** Engaged and fulfilled explorers
LOW SATISFACTION	**22%** Under-engaged and unfulfilled	**5%** Economical, unconvinced by the experience



Use **every** customer interaction to promote the breadth of tourism activities available. Help them discover the **added value** on offer in Dublin.

Source: Fáilte Ireland Domestic Tracker; leisure overnight trips Q3 2025–Q2 2026 (n=5,361). Segments show association, not cause.

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Dublin: the short break that works for every life stage

The need for a break is universal; the reason differs by life stage.



Parents

Time out from the daily routine to recharge.



Younger unconstrained

An escape from work and ‘adulting’.



Older unconstrained

Freedom to be spontaneous and reconnect.

Why a Dublin Short Break is the answer

- **Lots of things to see and do, for the whole travel party**
- **Paid and Unpaid activities to fit any budget**
- **Convenient, easy to get around**
- **A unique experience; city, coast and mountains**

Source: Fáilte Ireland campaign development research, 2024–2025 (qualitative; Kantar Link™ quantitative testing).

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Value: what this means for you

It is not simply about more discounting. Create experiences that visitors feel are worth paying for.

1. **Sell the whole break**
   Stay, food and experience, with a clear total price

2. **Lead on what drives value**
   Quality, food, cleanliness and amenities, visible when guests compare

3. **Reduce friction and effort**
   Identify potential pain-points and help tourists manage their trip plan

4. **Partner with other businesses**
   Package itineraries and offers to audience ‘reset’ needs



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Dublin, the city break with a difference

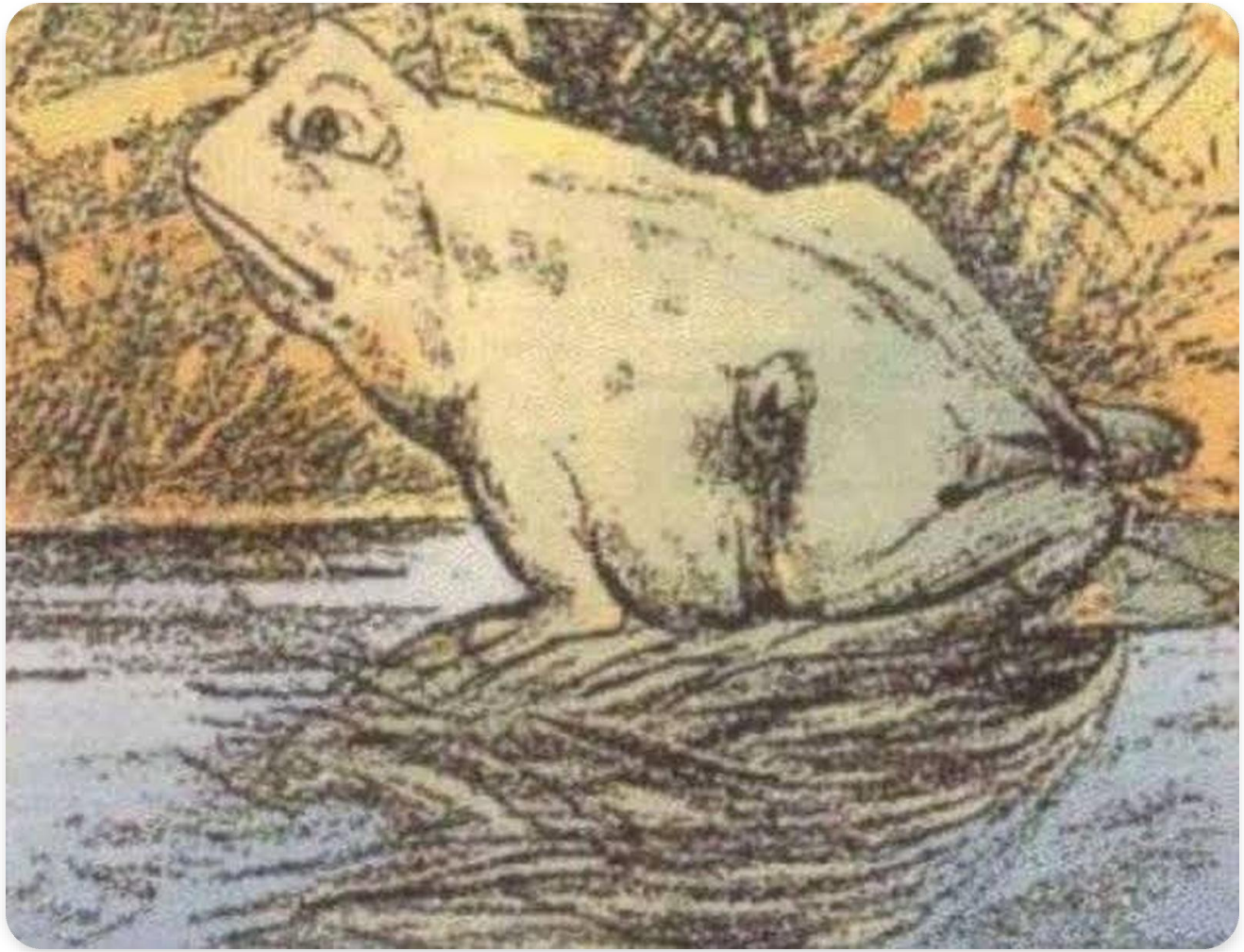
Creating added value

Helen O'Leary · The Innovate Room



What do you see?

Value is in the eye of the beholder



The value challenge is here to stay

- Costs
- Prices
- Competition

From ~~price~~ to value

THE INNOVATE ROOM



7 principles of creating value



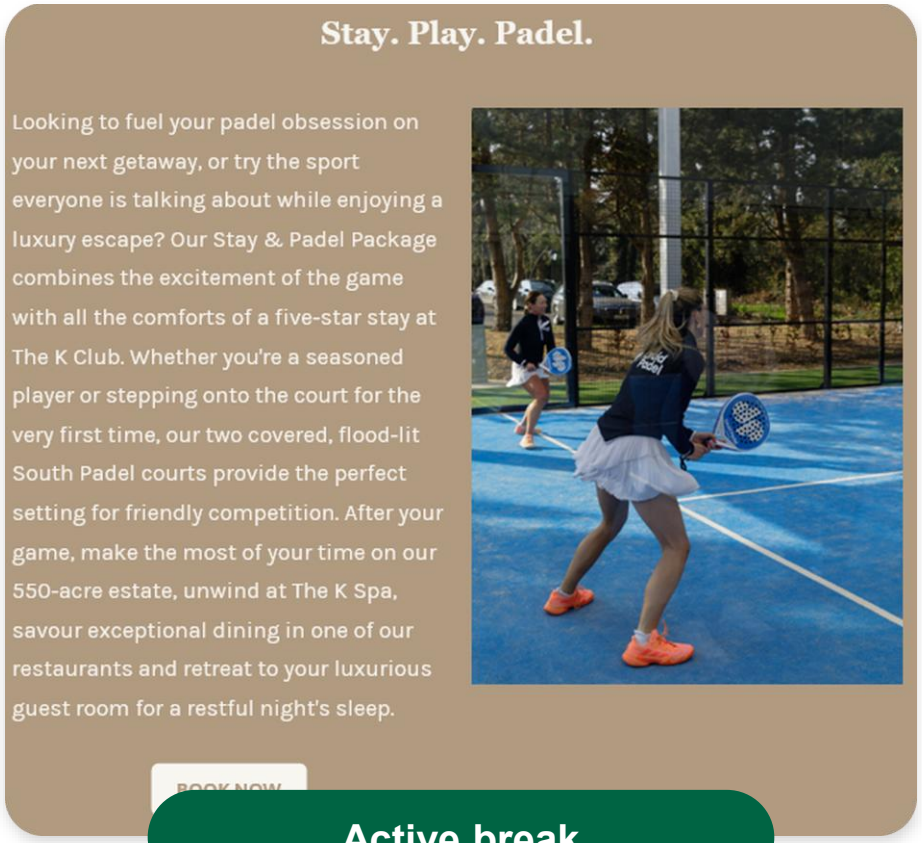
1. It's subjective, so make it personal
2. Grow willingness to pay
3. Value is created downstream
4. Value multiplies, profits stack
5. Know the value touchpoints
6. Make it easy
7. Leverage your partners

Value is subjective and highly personal



Family fun

vs

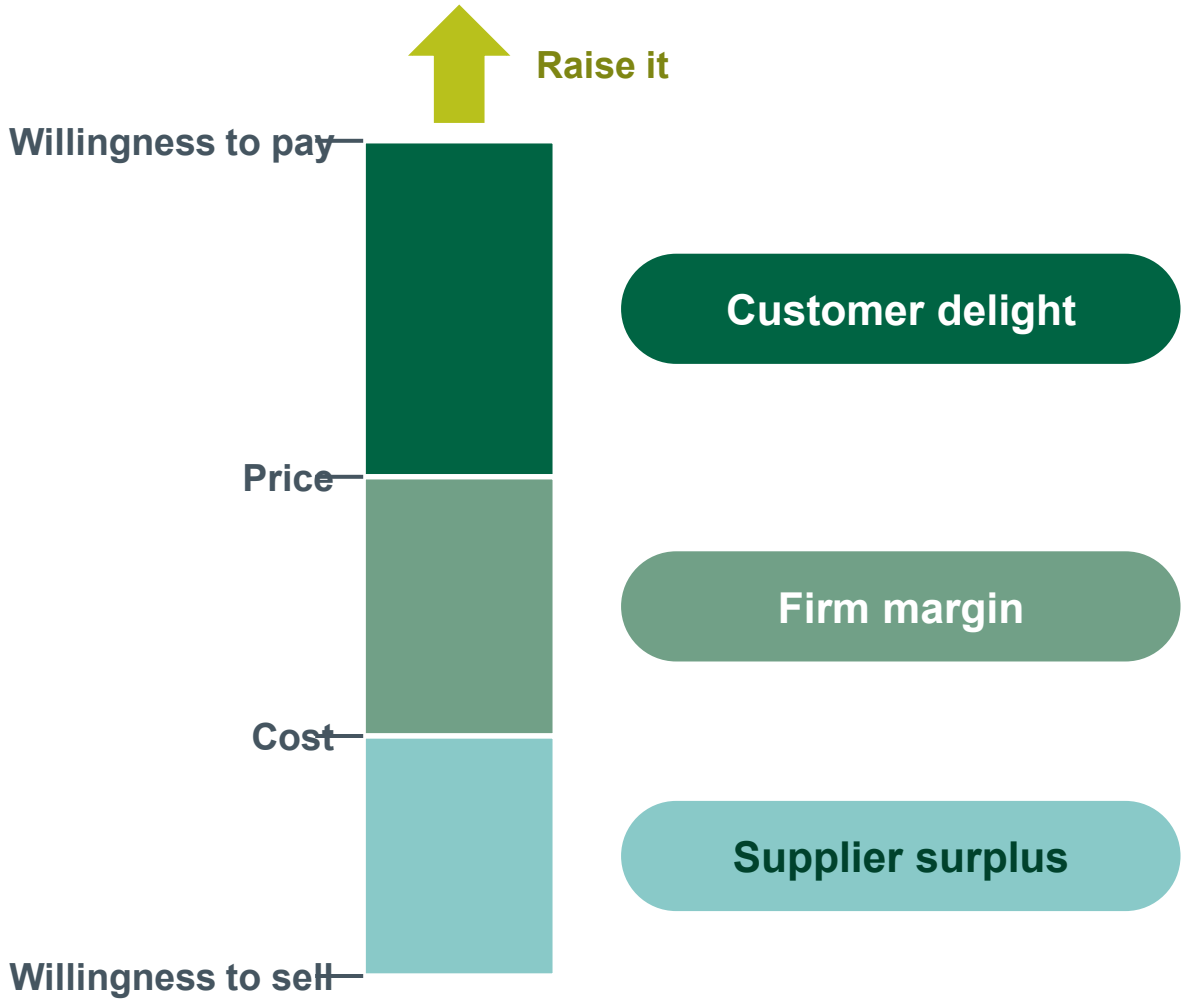


Active break

The value stick and willingness to pay

What they get vs what they give up

Time | Money | Energy



The value equation

Value

customer delight

=

Loyalty

they come back

+

Advocacy

they tell others

=

Profitability

yield, not discounts

Grow the value, not the discount



Dublin's value is created downstream

- **Visitor books room and breakfast**
- **Hotel buys and promotes local producers**
- **Producers hire, invest and grow**

e.g. **3fe coffee**, roasted in Dublin, on every breakfast table

Creating customer delight across the visitor experience



Authentic connections

Make it easy

Trust & recognition

Make it memorable

Return on time



Fáilte Ireland

DRIVER 1 OF 5

Authentic experiences

25% value souvenirs made with local craft



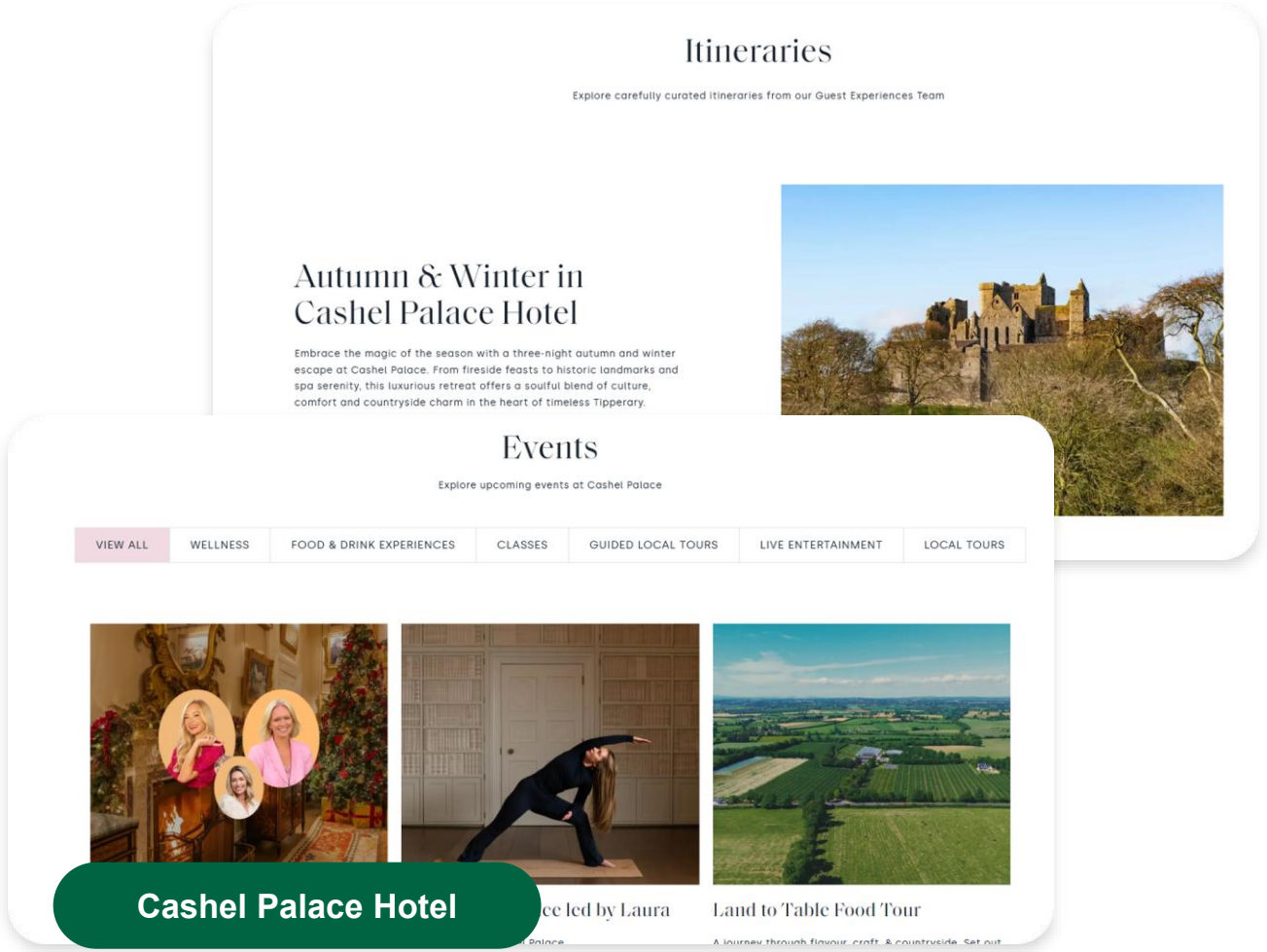
THE INNOVATE ROOM

Booking.com 2026 · silverworks.ie · Workshop photo: Unsplash

Make it ease(y)

DRIVER 2 OF 5

- Seamless bundles
- Imaginative itineraries
- Easy to find and book
- Easy for staff to deliver





DRIVER 3 OF 5

Trust and recognition

74%

want their trips personalised

+11%

room rate for every extra review point

“Welcome back, Sarah.”



DRIVER 4 OF 5

Make it memorable

- Hands-on
- Behind the rope
- Tell the local story
- Access over luxury
- Seasonal and scarce
- Made to share

Immerse them and they remember it

Partnership can happen anywhere



Your neighbours

Hotel × hotel



Artisans

Hotel × maker

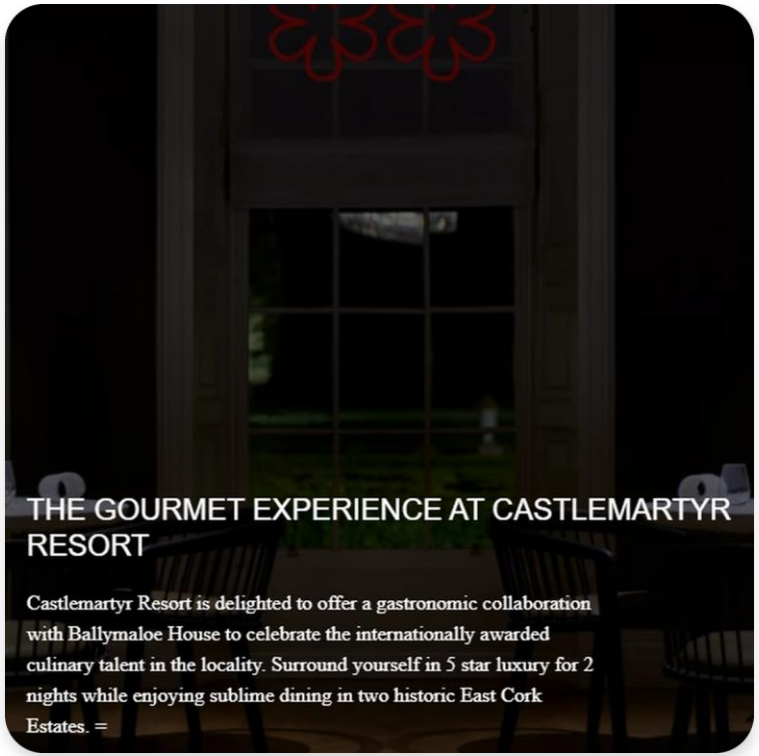


The unexpected

Attraction × food provider

Partner with your neighbours

HOSPITALITY × HOSPITALITY





Castlemartyr Resort × Ballymaloe House

2 nights

2 historic estates

2 signature dinners

One gourmet break in East Cork

Partner with artisans

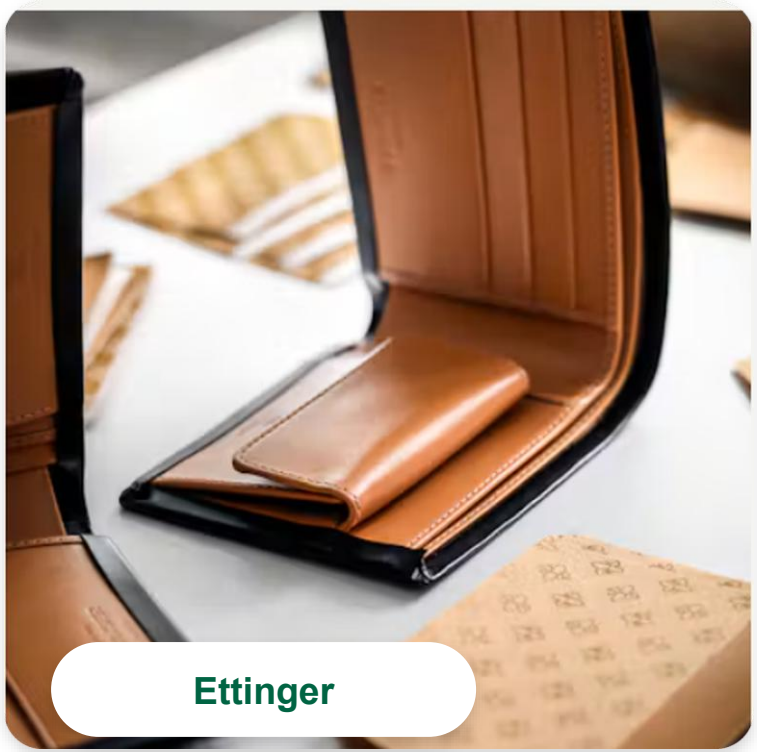
HOSPITALITY × MAKERS

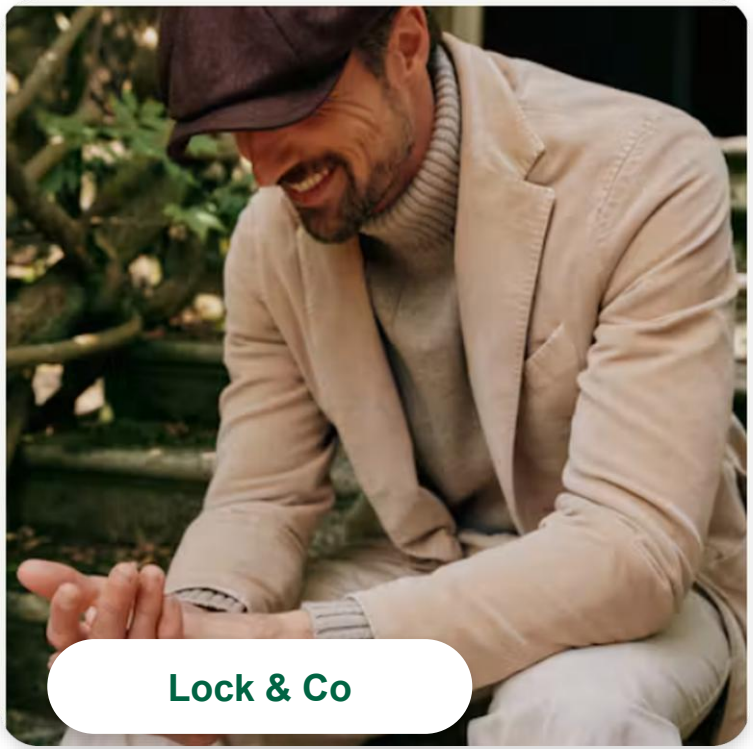
Meet the Makers

Pride of Britain Hotels

Leather, made by hand
Ettinger at Gravetye Manor

Hatters since 1676
Lock & Co at Northcote





Behind-the-scenes access to real craft

Partner with the unexpected

ATTRACTION × FOOD PROVIDER



> *We're neighbours here in Smithfield*
>
> Jameson Distillery Bow St

Jameson Distillery Bow St × Fable Bakery

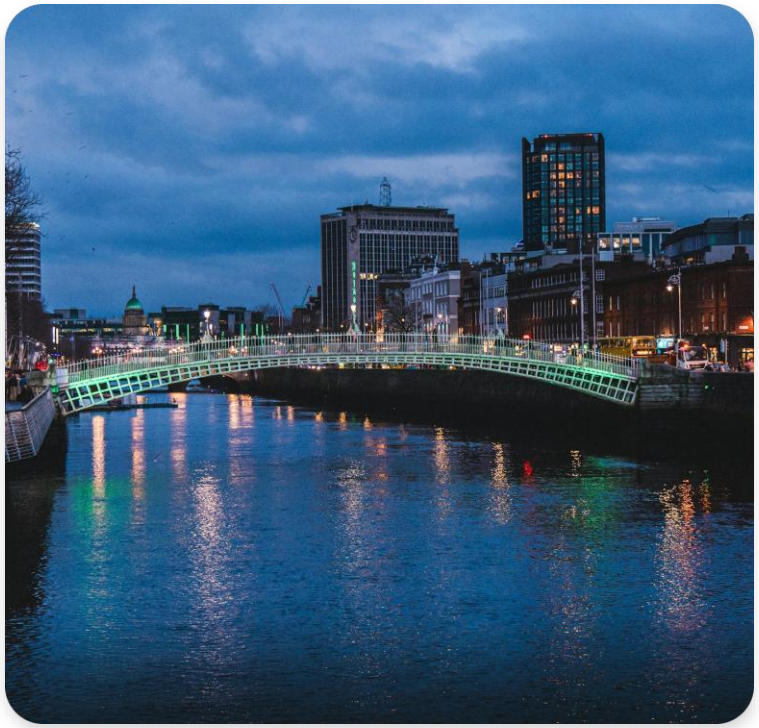
75 minute workshop

4 cask-strength tastings

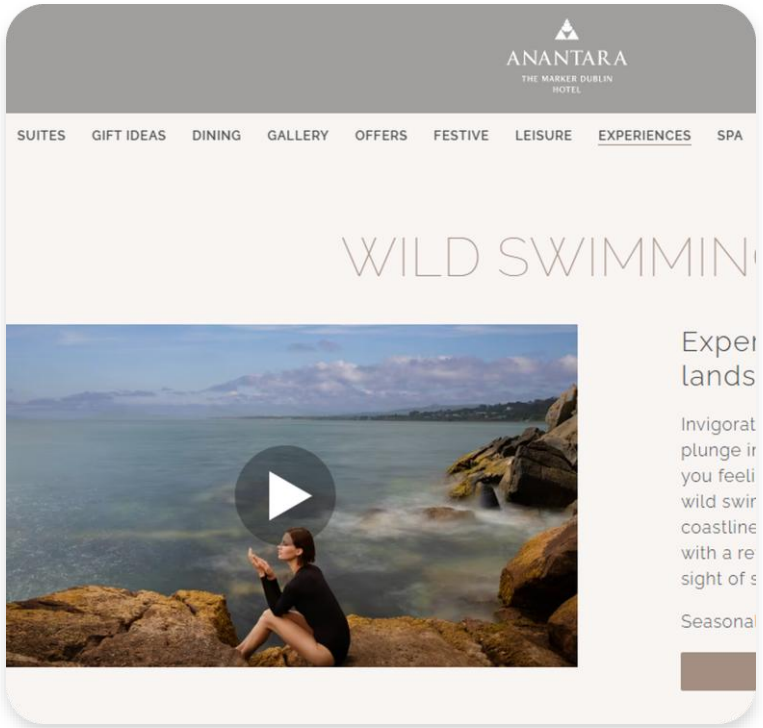
2 Fable pastries

Irish Coffee Workshop · from €60

Create return on time



City



Coast



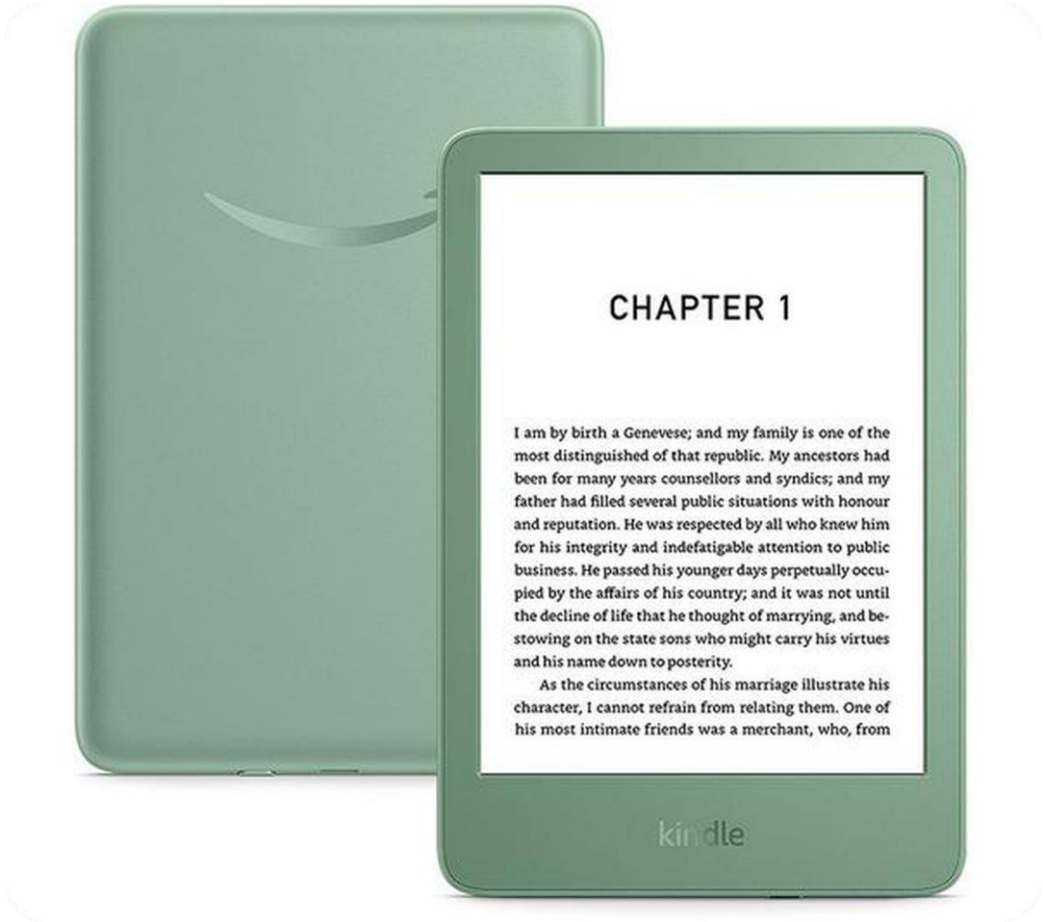
Mountains

City photo: Unsplash · Anantara The Marker · College Green Hotel

Find the touchpoints that matter most

Kindle vs Sony

Ease at the moment of purchase won



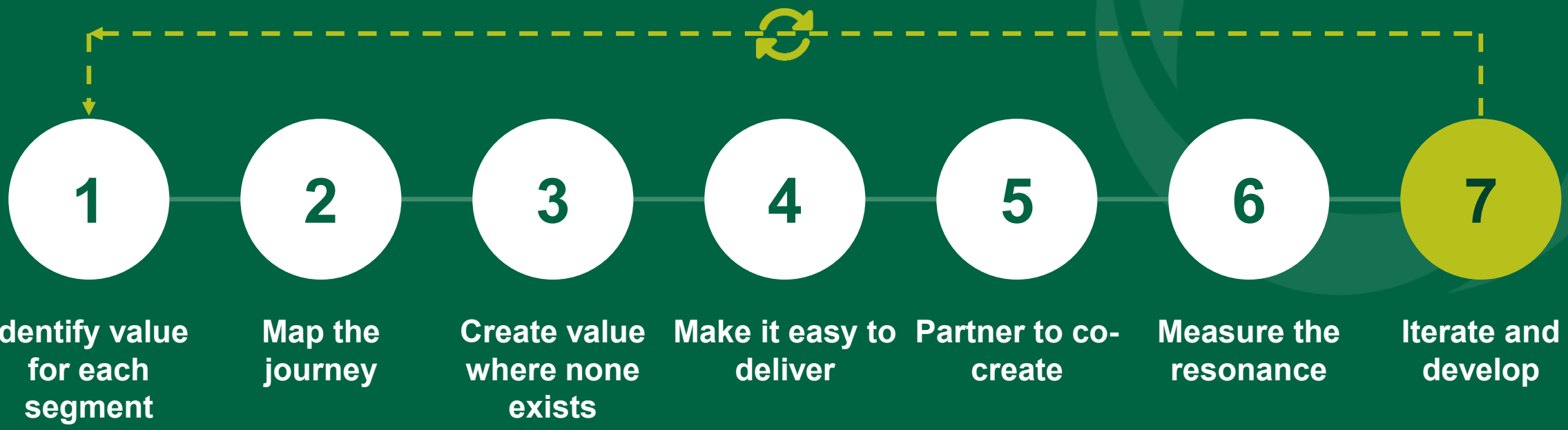
What's your winning touchpoint?

Add value at every touchpoint



Discover	Book	Arrive	Stay	Farewell
Easy to find and be found	Transparent pricing	Meet them at point of need	Delight in stay, spa, dining	A fond farewell
Itineraries that inspire	Personalise at booking	Smart rooms and recognition	Local partner experiences	A reason to return

What does all this mean for me?



Grow the value, not the discount

Thank you