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FÁILTE IRELAND



Ireland & Activity Tourism

Fiona Monaghan
Head of Product Development



Building Irish Tourism

REGIONALITY

SEASONALITY

Ireland



Domestic
Holiday
Sales & Marketing

International
Holiday
Sales & Marketing

Business & Events
Sales & Marketing

Brilliant
Visitor
Experiences

World
Class
Industry

Visitor Friendly
Infrastructure
& Community

Research
& Insights

KEY FOUNDATIONS

Environmental
Sustainability

Tourism
Coordination
Structures



Fáilte Ireland
National Tourism Development Authority

THE AMBITION

Ireland to be recognised as a World Class Outdoor Activity destination by 2028





Why Activity Tourism ?

- 🚶 **Regionality**
- 🚶 **Seasonality**
- 🚶 **Sustainability**
- 🚶 **Attracts incremental overseas visitors**
- 🚶 **Opportunities**

Rationale

Mild temperate climate

Activities can be enjoyed year round

A cultural landscape

Availability of good outdoor apparel





WILD ATLANTIC WAY

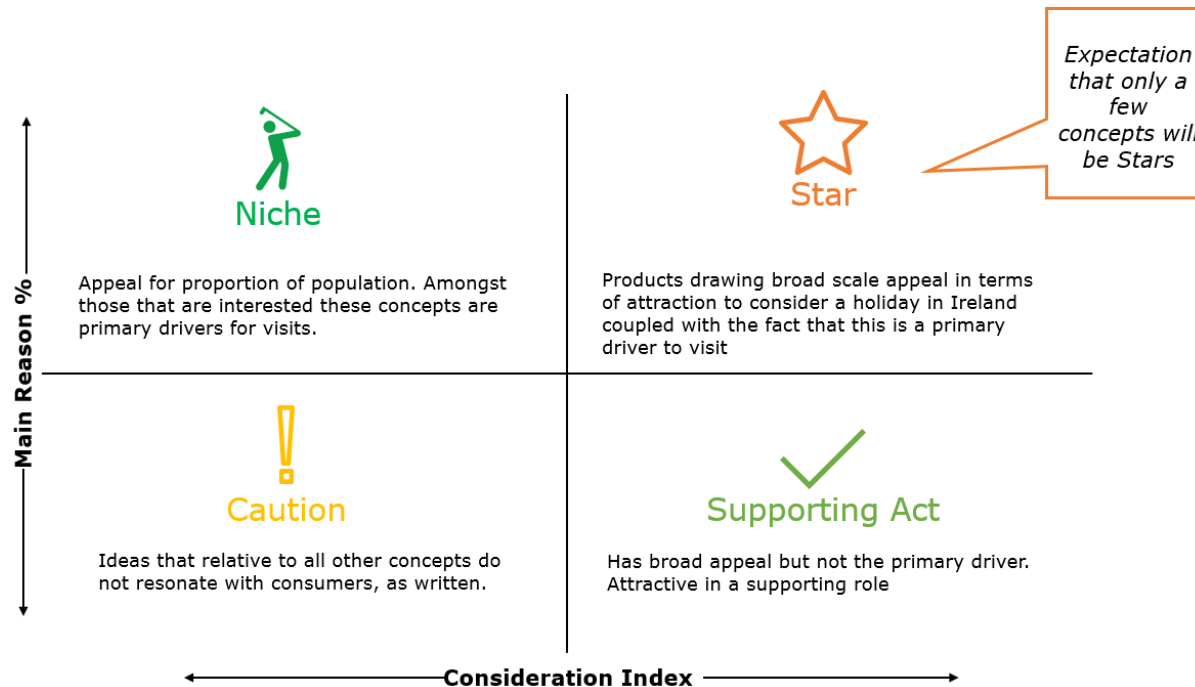


Innovation Screener Programme Objectives

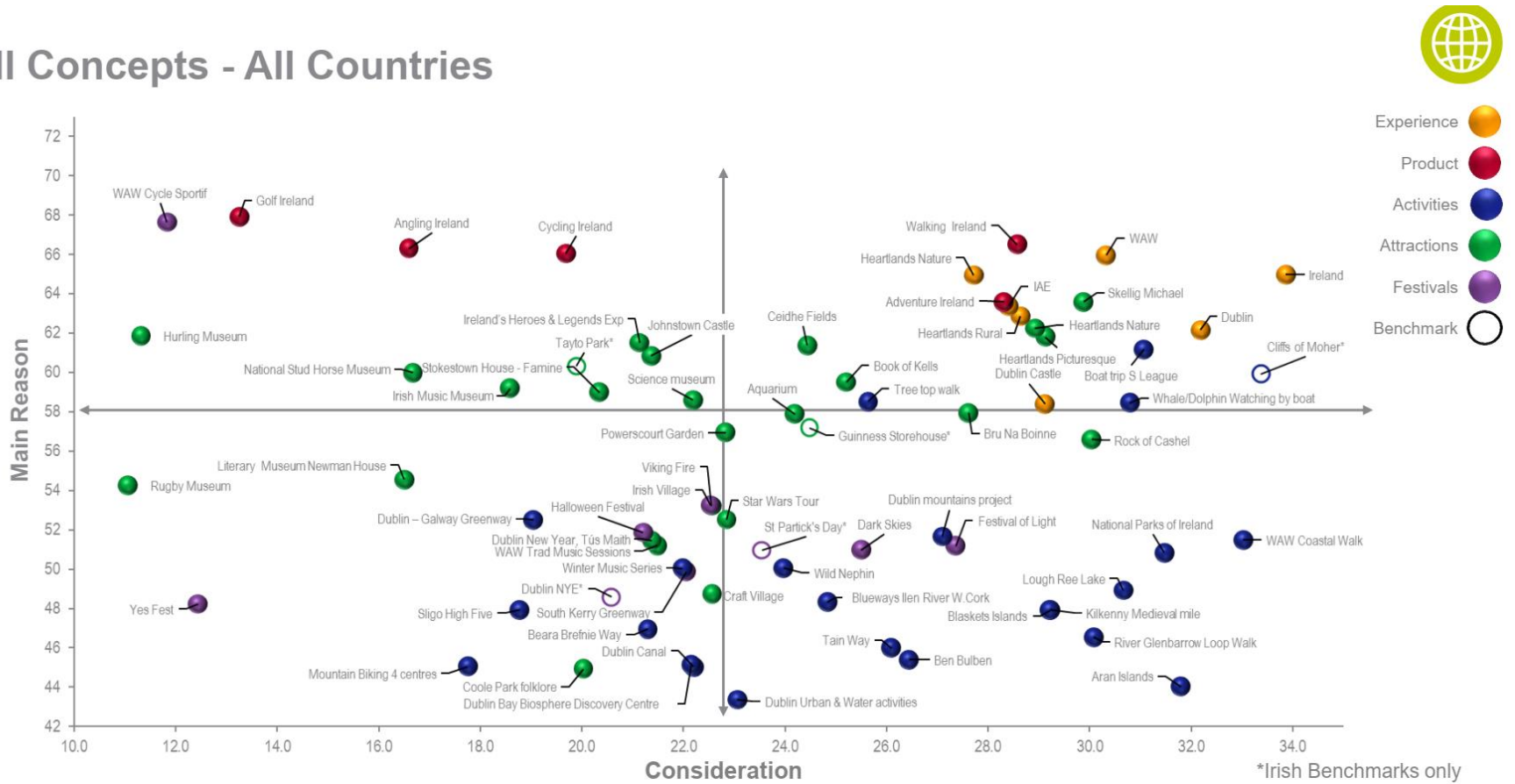
1. Evaluate and rank appeal of individual concepts and concept categories, to feed into
 - Capital grant schemes
 - Experience development pipeline
 - Tourism innovation process
 - Corporate strategy
2. Measure likelihood to consider holiday experience
 - benchmark these versus established concepts [Irish & International]
3. Identify ways to develop concepts using learnings from the research
4. Create an interactive management tool and central idea library

Consideration Index vs. Main Reason to Visit

Activities - Innovation Screener Research (November 2018)



All Concepts - All Countries



Top Performers

- **Boat Trips** - with an opportunity to view dramatic scenery or encountering exceptional wildlife are the only activities that act as a core motivator for travel
- **Experiences in nature** and those that involve boat trips and walking are top performing of all activities and offer mass market appeal
- **Iconic Coastal Walks stand out as having particular potential**

Drivers of Appeal

- The top performing activity experiences have Ireland's **dramatic landscapes** playing a central role. The landscape is the attraction, the activity is a means to sightsee
- Activity for the mass market is **not overly physical** - it needs to be for all ages and abilities
- Experiences on or near water test strongly and are much more about **getting on the water**, than in it (via boats rather than water sports)

Drivers of Appeal

- **Walking** is playing an increasingly important role for all markets
- **Adrenaline and water sports** are for the select few
- More **rounded experiences** test well
 - Activities that stretch beyond the initial activity and link the tourist to local villages, food and music stand out

Market Nuances



BRITISH MARKET: like easy going activity close to an urban base. Walking is their activity of choice



US MARKET: like to get active in an easy-going way. Walking is increasingly important to this market



GERMAN MARKET: most physically active of all the markets, happy to dedicate more time to activities than other markets



FRENCH MARKET: are very sedate in their activity. Getting on or near water very much appeals to them



Priority Activities





Whether engaged in any of these activities or events during the trip (main purpose holiday)

Type of Activity	2012	2013	2014	2015	2016
Hiking/ Cross-country walking	371,000 (13%)	558,000 (18%)	866,000 (26%)	1,207,000 (30%)	1,514,000 (34%)
Cycling	73,000 (3%)	141,000 (4%)	153,000 (5%)	204,000 (5%)	247,000 (6%)
Water-based (excl. fishing or swimming)	62,000 (2%)	73,000 (2%)	120,000 (4%)	83,000 (2%)	135,000 (3%)
Golf	106,000 (4%)	125,000 (4%)	96,000 (3%)	125,000 (3%)	109,000 (2%)
Angling	86,000 (3%)	87,000 (3%)	115,000 (3%)	107,000 (3%)	95,000 (2%)

Walking & Hiking



Walking offers enormous **growth potential**, regardless of **ability** it provides opportunity for visitors to get **closer** to our **landscape** and **seascapes**.

37% or 1.8 million overseas holidaymakers engaged in some type of walking in 2017, the highest engagement in any type of outdoor activity.

Trail Deve



Hierarchy of Trails

National Trails

(Iconic, motivating & multi day experiences) e.g. Coast to Coast Greenway, Eurovelo

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Regional Trails & Clusters

(0.5-1 day experiences)
e.g. Great Western Greenway, Waterford Greenway, Great Southern

Local Trails

(2- 4 hour leisure trails / half day experiences)
e.g. Cycle Trails in National Parks & Forest Parks, Greenways ≤ 20km

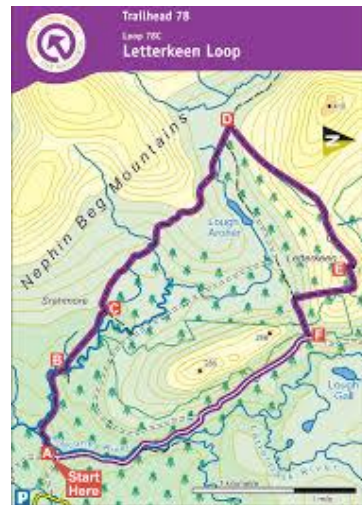
Current Walks Offering in Ireland

43 Way Marked Ways

Walks often developed in the routes of "less resistance" to negate access challenges – trails not developed with the Visitor Experience in mind.



National Looped Walks and Trails



Beara Breifne Way



Beara-Breifne Way
Slí Bhéara-Breifne



An Chomhairle Oidhreachta
The Heritage Council

Fáilte Ireland
National Tourism Development Authority



Wild Atlantic Way Coastal Path



- ❑ 9 Coastal Counties
- ❑ Regionality
- ❑ Seasonality
- ❑ Economic opportunities
- ❑ Social Benefit

Types of Walkers



Visitor

- Tourism is main reason
- 1 to 3 miles
- From hubs
- Very large



Walker

- Walking one of the reasons
- Experiencing landscape
- 1+ days / Multi-day
- Medium



Long Distance

- Walking is main reason
- Challenge
- LD trails
- Small



Through Hiker

- Solitude / sabbatical
- Self-sufficient
- Basic
- Very small

Critical Success Factors

Walker / Long Distance Walker

Factors	Importance
Landscape	
Natural beauty	10
Variety of landscape	7
Wild and remote	5
Trail	
Hugs the Coast	9
Off Road	10
Multi Use	1
Terrain difficulty	2
Well maintained path	10
Fully waymarked	9
Services	
Quality accommodation	7
Walker accommodation	4
Well-spaced accommodation	10
Shelter	2
Luggage Transfer	8
Food and Drink	8
Toilets	3
Connectivity public transport	7
Accessibility of start/end	7
Experiences	
Outdoor activities	3
Heritage, cultural and other	6
Information and Incentives	
Maps and route guides	9
Website	10
Start/Finish Markers	5
Certificates/Stamping	4
Walking Holiday	
Week long holiday	9
Packaged booking service	7
Social interaction	7

Success Factors for a Coastal Trail

Not essential that it 'hugs the coast'

- Ground conditions may be poor e.g. wet
- Subject to erosion
- Coastal designations

A trail further from the coast can offer –

- Spectacular views of the coast line
- Improved drainage
- Avoid impact on sensitive flora and fauna

***'See it, hear it, smell
it'***



Strategic Tourism Trail Standards



Path Quality

- Trail infrastructure and signage follow best practice
- Best possible route identified and legal agreements in place

Environment

- Trail avoids negative impact on the environment or seeks to improve it
- Walker's experience of the environment e.g. intensively used environment, variety of landscape

Management

- Management structures & processes in place to ensure trail sustainability

Accommodation

- Accommodation and evening meal at end of each day

Services and Facilities

- For example, luggage transfer, booking/ reservations, vehicle parking, guiding, map, water, information availability

Challenges



Very Sensitive Landscape

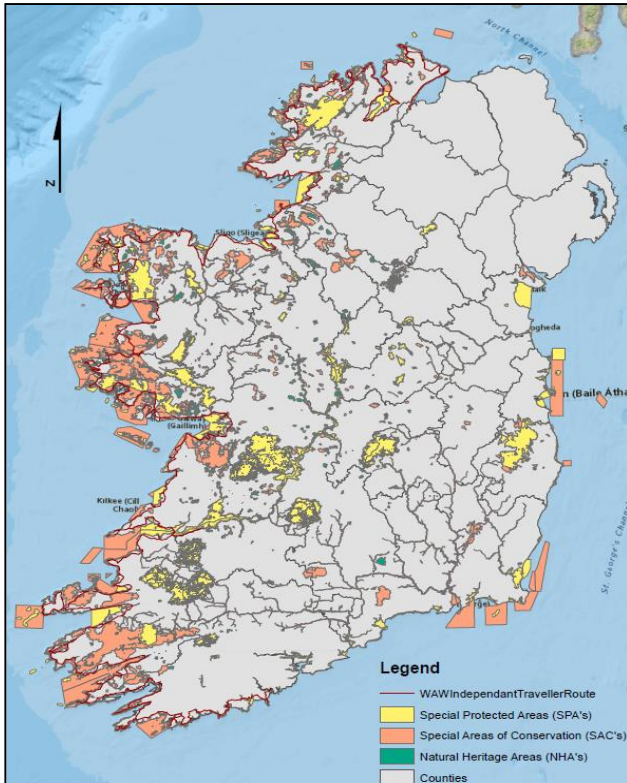
Landscape is our Hero Asset

SAC's – Special Areas of Conservation

SPA's – Special Protection Areas

NHA's – National Heritage Areas

We need to mind it!



Access to the Countryside

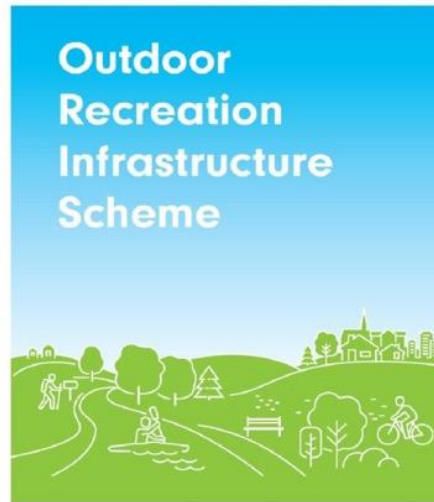
Currently no “enforced” access legislation in Ireland




How will we fund future developments?



 An Roinn Forbartha
Tuaithe agus Pobail
Department of Rural and
Community Development




2018 Scheme Outline

 An Roinn Forbartha
Tuaithe agus Pobail
Department of Rural and
Community Development

Project Ireland 2040
**Building Ireland's
Future**

Rural Regeneration and Development Fund



Scheme Outline and Information Booklet

The journey has begun....



€4.95 investment@ Sliabh Liag, Co Donegal



Thank You