ADVENTURE EXPERIENCES IN IRELAND: SOME FACTS & INSIGHTS

Caeman Wall,
Head of Research & Insights, Fáilte Ireland

The International Context

Global View

- International tourist arrivals up 4% in 2012
- Up 4% in the first quarter of 2013
- Forecast for 2013:
  - World arrivals +3% to +4%
  - Europe arrivals +2% to +3%

Source: World Tourism Organisation (UNWTO)

European "Sports" Holidays – Top Ten Originating Countries

Rank	Type	%
1.	Germany	36
2.	Netherlands	9
3.	Switzerland	6
4.	Austria	6
5.	France	5
6.	Belgium	5
7.	Great Britain	5
8.	Czech Republic	3
9	Denmark	3
10.	Italy	3
Source: IPK International European Travel Monitor		

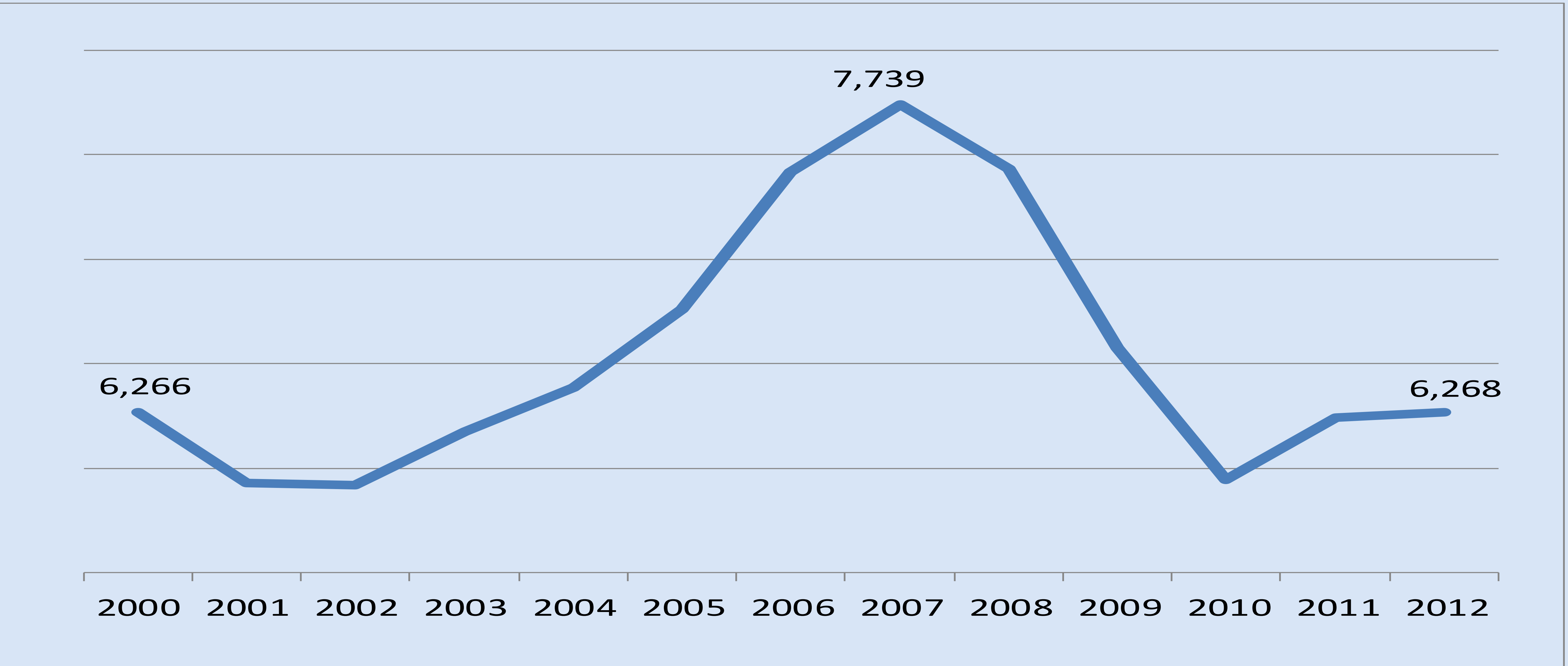
European "Sports" Holidays – Top Destination Countries

Rank	Type	%
1.	Austria	22
2.	Spain	11
3.	Italy	10
4.	Germany	9
5.	France	8
6.	Great Britain	5
7.	Switzerland	3
8.	Netherlands	3

Source: IPK International European Travel Monitor

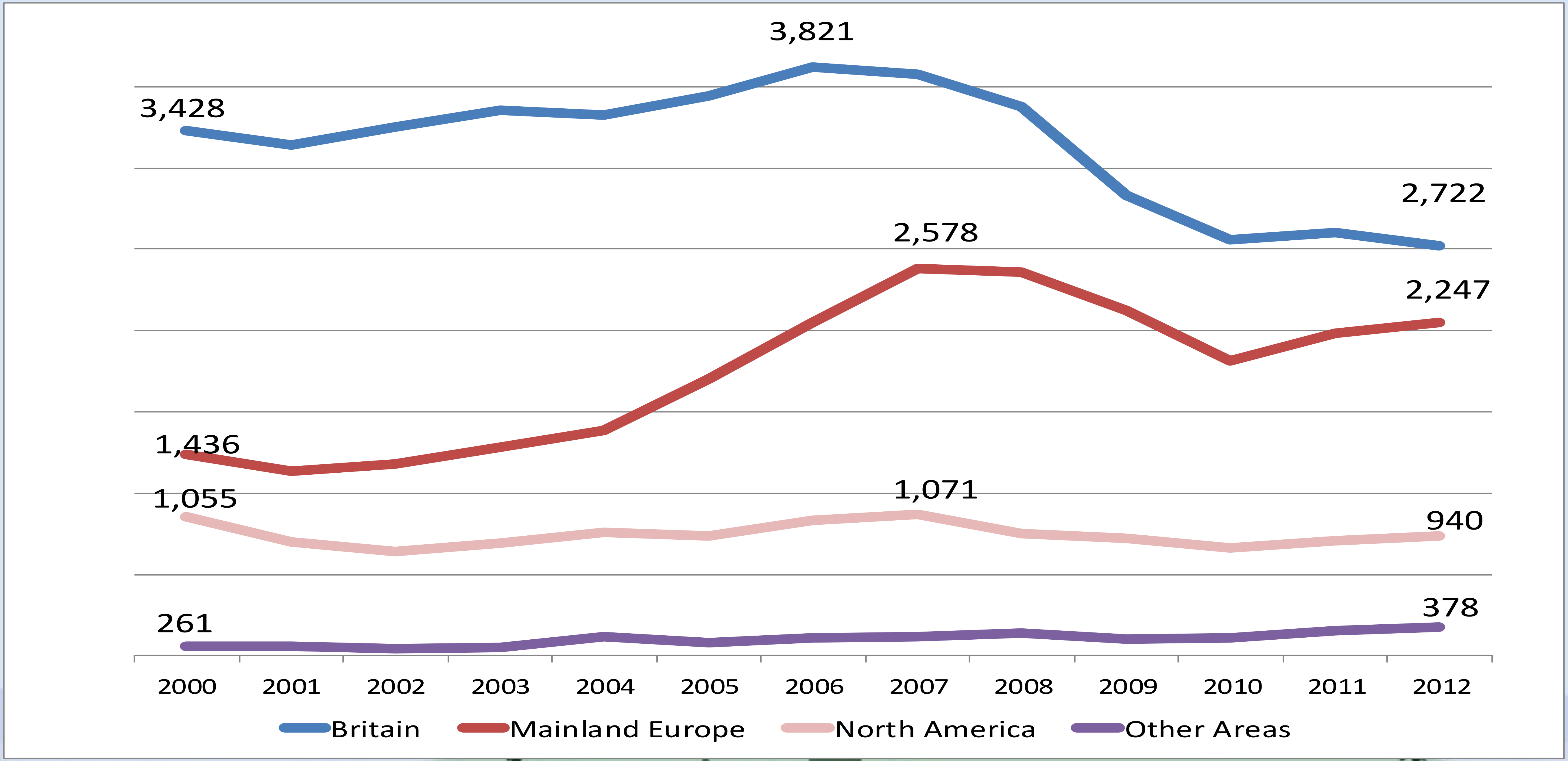
The Irish Context

Overseas Tourism Performance (000s) 2000-'12



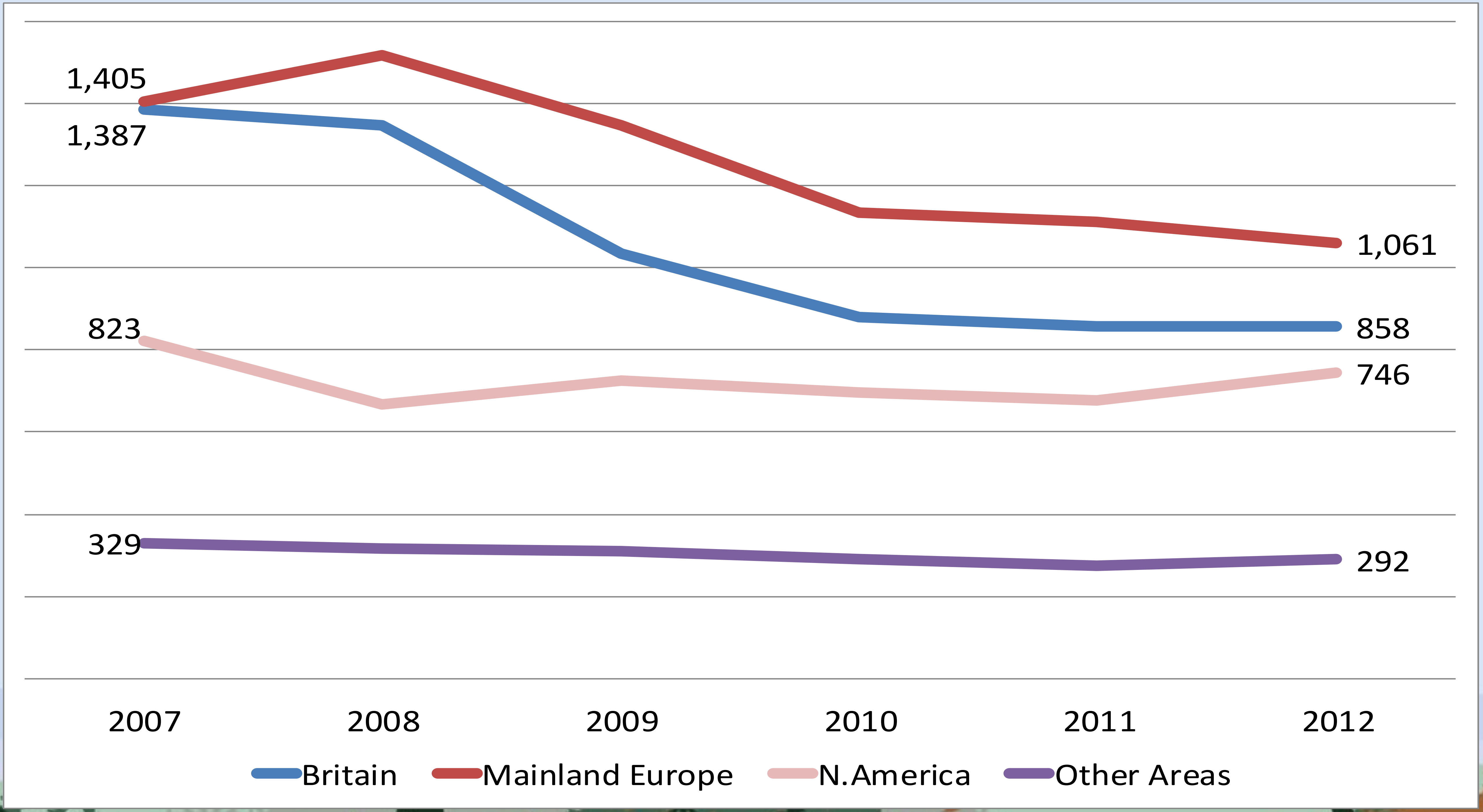
Source: CSO, NITB, NISRA & Fáilte Ireland

Overseas Tourism Performance (000s) 2000-2012



Source: CSO, NITB, NISRA & Fáilte Ireland

International Tourism Earnings (€mn) 2007-2012



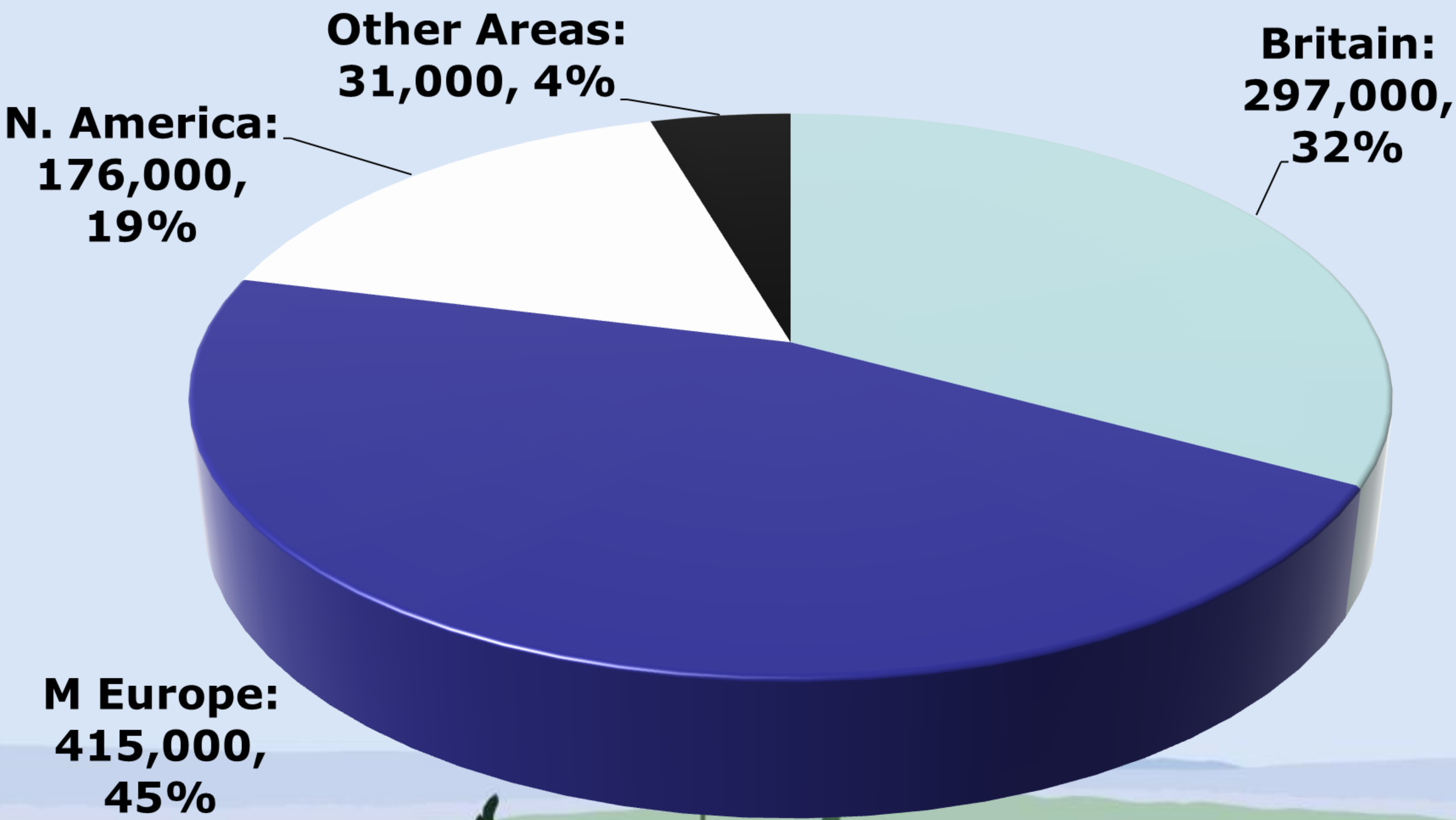
Source: CSO, NITB, NISRA & Fáilte Ireland

The Volume & Value of Activity Tourism in Ireland

	Overseas Participants (000s)	Spend in Ireland (€mn)
Hiking/Walking	743	649
Cycling	173	200
Angling	107	90
Equestrian	71	76
Water-based*	97	61

Sources:
Survey of Overseas Travellers 2011
** Survey of Overseas Travellers 2012*

Activity Tourism by Markets



A New Approach to Segmentation

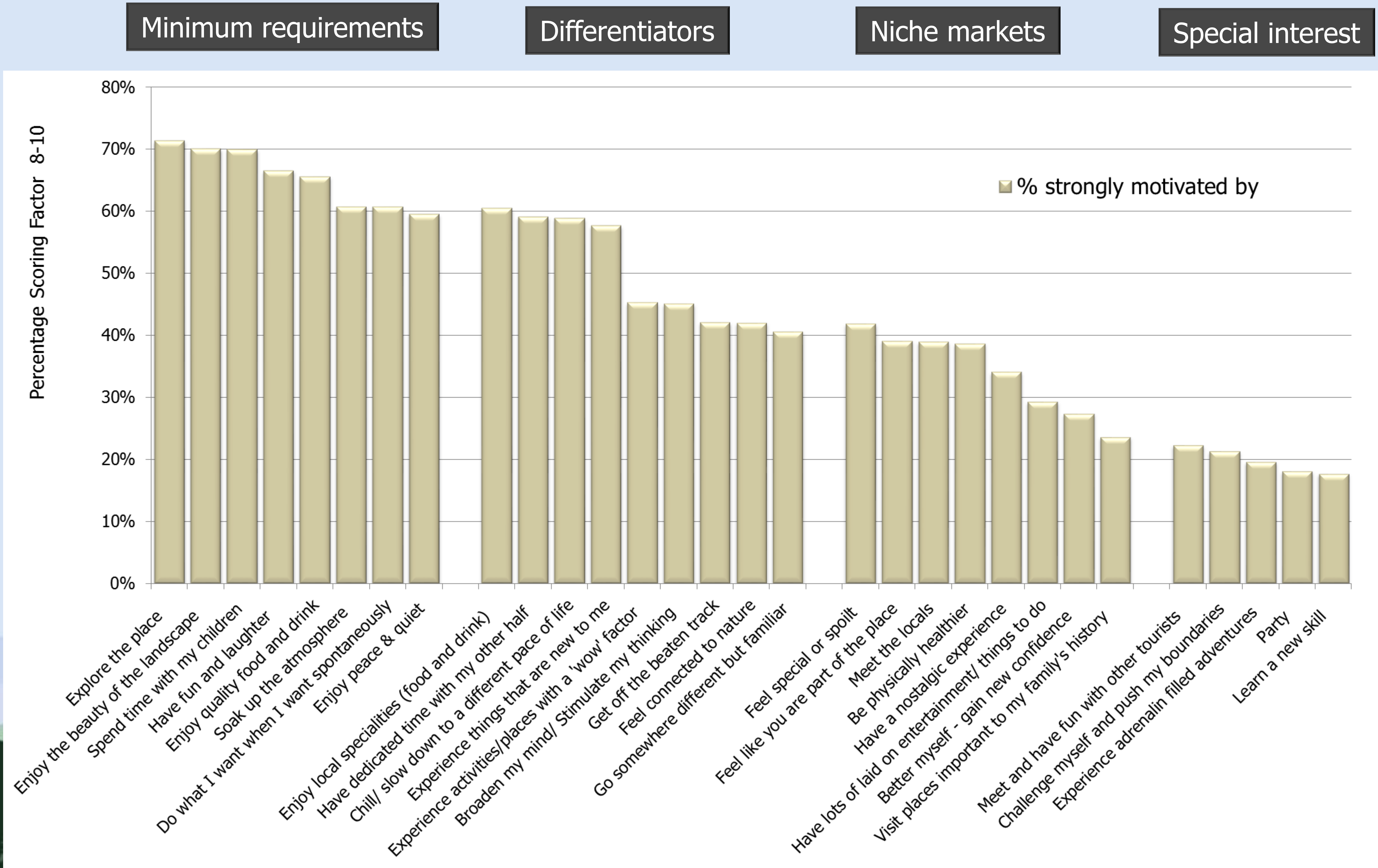
Segmenting the Market

- **The old model was needs-based, focusing on what people like to do on holidays.**

- **The new model is motivation-based, looking at why people take holidays and what they want to feel, both during and after.**

- **Motivation-based segmentation is richer in insights and supports better targeting.**

Holiday Motivations



The Segments

Target Segments	Other Segments
1. Social Energisers	4. Top Tenners
2. Culturally Curious	5. Easy-Going Socialisers
3. Great Escapers	6. Nature Lovers
	7. Spoil Us

SOCIAL ENERGISERS

Who are they?
Social Energisers are young – 15 to 34 – and like to holiday in groups or as couples. A good example would be a group of 28-year-olds on a long weekend in Dublin or Belfast. They're friends or colleagues, looking for a cool, exciting trip somewhere new and vibrant.

What they want from a holiday:
Social Energisers really like having a laugh and sharing the adventure with their friends. They love new experiences and exploring new places – the more out-of-the-ordinary, the more exciting, the better. It's great if there's lots to do in a relatively small area, so they don't have to plan too far ahead. They're up for being spontaneous, as this often leads to even more fun and laughter and a really great break.
Social Energisers want to be at the heart of it all – wherever's social, wherever it's happening. But their definition of a good time is wider than just partying. They're also looking for interesting events, fun activities, gigs. Always ready to try new things – exploring the city by day for its vibrancy and unique atmosphere, as well as enjoying the nightlife – Social Energisers will go for something unusual as long as it has the 'wow' factor they're looking for. They're hungry for experience so they're likely to be packing everything in.

3rd party logo

CULTURALLY CURIOUS

Who are they?

The Curiously Cultural are older – most are over 45 and more than a quarter are over 65. They travel as couples or on their own. If they had children, they have grown up or have left home. Typical Curiously Cultural travellers would be 55 years old, taking a holiday with their partner. They are out to broaden their minds and expand their experience by exploring new landscapes, history and culture. They are curious about everything and are delighted to discover the world for themselves once again.

What they want from a holiday:

They're interested in all that a place has to offer and they want it to be authentic. They won't choose a brand or visit a place just to follow the herd. This is their own exploration and they really want to cover everything, to 'do' a place. The Curiously Cultural love to discover history and always find ways of getting real insight. Independent, 'active' sightseers, they are looking to encounter new places and experiences that are out of the ordinary. The Curiously Cultural like to feel that they have not only broadened their mind but also immersed themselves in a place, giving their senses a holiday too – the sights, the sounds, the smells, the tastes. They enjoy connecting with nature and getting off the beaten track. They like people to show an interest and educate them – to feel they've connected. They really appreciate personal guides.

MCCP THE PLANNING AGENCY

Arkenford market modelling and research

3rd party logo

GREAT ESCAPERS

Who are they?
Great Escapers tend to be younger, around thirty. They are often couples, some with babies or quite young children. Most are in serious need of time out from busy lives and careers. So they are specifically interested in rural holidays, and travel very much as a couple or family. Great Escapers are on holiday for a break, to get physical with nature, and to reconnect with their partner.

What they want from a holiday:
To connect with the landscape, to feel the earth beneath their feet, to soak up the beauty of it all. A sense of history, of their place in the vastness of nature – they want to feel part of it. Against this kind of backdrop Great Escapers can spend real quality time bonding with those closest to them. They can rebalance themselves and take stock of their lives, concentrating on what's important in life.
They appreciate peace and quiet between activities … the point is the trip itself. It's 'down time', it's being off the beaten track, it's a Great Escape. But it's important that getting away from it all is easy enough – they want to get the 'wow' moment without too much effort.
Most importantly, Great Escapers want to come home refreshed and revitalised, their batteries recharged.

MCCP THE PLANNING AGENCY

Arkenford market modelling and research

3rd party logo

New Consumer Reserach

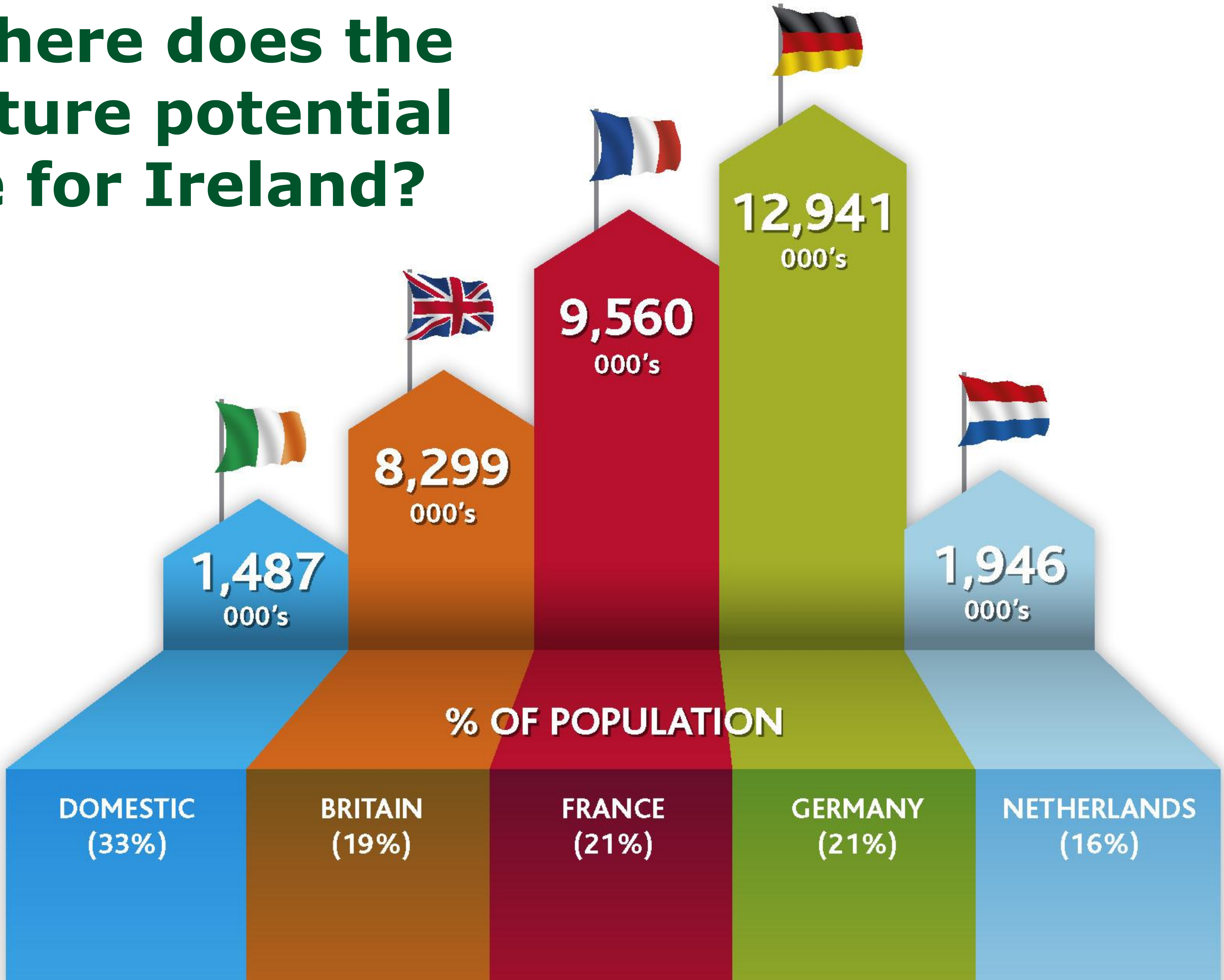
» Market Research 2013

Current Market Performance

Share by market:

- Britain (31%)
- Mainland Europe (44% - of which France 11%; Germany 10%);
- North America (18%)
- Other long haul (6%)

Where does the future potential lie for Ireland?



Key points on walking in Ireland

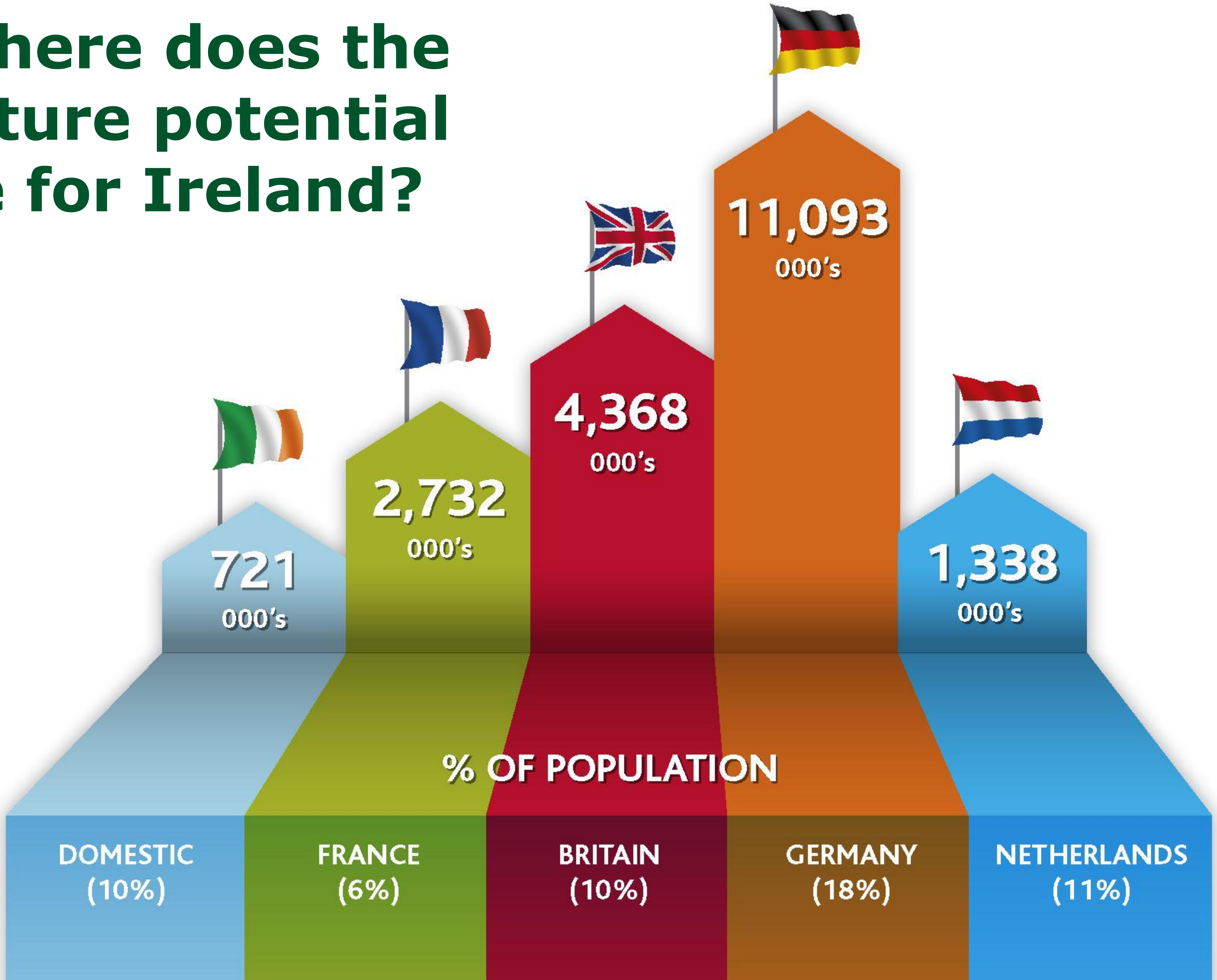
- Walking offers the highest potential of any activity for Ireland for both domestic and overseas markets.
- Among those who are aware, Ireland's walking offering is well rated, as all attributes attract high proportions of 'excellent' or 'good'.
- What can be seen across all activities is that beautiful landscape is the main reason for coming to Ireland.
- Activity-doers on the whole appear to think destination first and then consider whether it would be good to do a particular activity there.
- The holiday experience is what matters in destination choice; whether the country is set up for activities comes second for most.
- Promoting Ireland as an activities destination is about using Ireland's USP in same way as for general marketing; the activity is a means of enjoying the Ireland experience.

Current Market Performance

Share by market:

- Britain (18%)
- Mainland Europe (54% - including France 12%; Germany 9%);
- North America (18%)
- Other long haul (10%)

Where does the future potential lie for Ireland?



What are peoples perceptions of watersports in Ireland?

- Ireland watersports product on offer doesn’t rate particularly well, with a noticeable trend towards ‘satisfactory’ or ‘poor’, across all attributes from value for money, quality of the offer, range of choice etc, to the practicalities of booking, availability of information, availability of trained guides and availability of equipment.
- Awareness across all areas of the offering is also quite low, therefore this lack of awareness could also be the reason that the watersports product on offer was rated so poorly by people.

Key points on watersports in Ireland

- The potential for watersports activities amongst the British, French, German and domestic markets is quite good with a combined core market potential of almost 16m people.
- This market potential is however open to very strong competition from warm weather countries such as France, Spain and Italy in particular.
- However for those that were aware of what Ireland had to offer, it wasn't rated very well, across all aspects of the offering.
- This could be due to the fact that a significant proportion of the overseas markets are unaware of what Ireland offers in relation to watersports. This is across all areas related to price, value, quality and the practicalities involved in booking and participating.
- The Irish are more critical of the watersports offering, with value for money seen as key.
- **In the domestic market**, awareness of the offer, particularly in relation to the practicalities of getting a trained guide and availing of equipment needs to be improved, and may in fact improve perceptions of the product overall.
- Watersports has probably the most to do in the area of promotion and raising awareness, as the core potential markets for these activities are quite good.
- What can be seen across all activities is that beautiful landscape is the main reason for coming to Ireland. Activity-doers on the whole appear to think destination first and then consider whether it would be good to do a particular activity there.
- The holiday experience is what matters in destination choice; whether the country is set up for activities comes second for most.
- Promoting Ireland as an activities destination therefore is about using Ireland's USP in same way as for general marketing; the activity is a means of enjoying the Ireland experience.

Rating of Activities (%)

Rating (%)	Equest.	Fishing	Hiking/ Walking	Water-based	Cycling
Very good	63	34	58	71	46
Good	34	60	40	26	47
Fair	2	3	1	2	5
Poor	-	1	*	-	1
Very poor	-	*	-	-	-

Source: Holidaymaker Attitudes Surveys

Rating of Other Holiday Aspects by Activity Holidaymakers

Rating (%)	Very Good	Good	Fair	Poor	Very Poor
Friendliness of people	73	25	*	*	*
Natural environment	78	28	1		*
Condition of roads	16	51	22	6	1
Cleanliness of locality	43	51	5	1	*
Signposting for roads/directions	18	58	12	4	1
Signs for attractions	20	61	10	3	1
Availability of things to see/do	43	55	1	*	*

Source: Holidaymaker Attitudes Surveys

Summing Up

- **High yielding – spending 40% more that the average overseas holidaymaker.**
- **Long staying – 30% longer.**
- **Two main market – GB & Mainland Europe.**
- **In general, holiday experiences matter most in destination choice, activities are secondary.**
- **However, about one in three are 'specialists'.**
- ***<u>People go home happy!!</u>***

SUPPLEMENTARY SLIDES

Rating of Accommodation – Facilities & Value (%)

Rating (%)	**Facilities**	**Value**
Very good	50	38
Good	45	51
Fair	3	9
Poor	1	1
Very poor	*	*

Source: Holidaymaker Attitudes Surveys

Participants by Market (%)

Market	Hiking/ Walking	Angling	Equst.	Cycling	Water-based
Britain	**25**	**53**	**30**	**24**	**57**
M. Europe	**49**	**35**	**55**	**59**	**37**
France	***9***	***5***	***17***	***17***	
Germany	***12***	***9***	***12***	***9***	
N. America	**20**	**8**	**15**	**11**	**5**
Other Areas	**5**	**3**	*****	**5**	**1**
Source: Survey of Overseas Travellers					

Participants V. Specialists

	Participants	Specialists	% of Specialists
Hiking/ walking	578	198	34%
Cycling	149	49	33%
Angling	118	75	64%

Source: Survey of Overseas Travellers

Regions Visited

Regions Visited (%)	Any holiday	Activity holiday
Galway/Mayo	27	**32**
West Clare	13	15
Dingle Peninsula	8	**16**
North West Arc	5	6
Ring of Kerry	19	**25**
West Cork	5	**12**
Cork City and Harbour	18	**27**
South East Triangle	13	11
Dublin and its Doorstep	73	51
Shannon Corridor	6	6
Source: Survey of Overseas Travellers		

Rating of other aspects (activity holidaymakers)

Rating (%)	Very Good	Good	Fair	Poor	Very Poor
Friendliness of people	73	25	*	*	*
Natural environment	78	28	1		*
Quality of architecture	49	45	4	*	*
Condition of roads	16	51	22	6	1
Cleanliness of locality	43	51	5	1	*
Signposting for roads/directions	18	58	12	4	1
Signs for attractions	20	61	10	3	1
Availability of things to see/do	43	55	1	*	*

Source: Holidaymaker Attitudes Survey

Length of stay (%)

OVERSEAS HOLIDAYMAKERS	All	Activity
1-3 nights	25	11
4-5 nights	23	18
6-8 nights	31	39
9-14 nights	17	22
15+ nights	4	10
Average nights	6.7	8.6

Source: Survey of Overseas Travellers 201