# OUTDOOR TOURISM MARKETING PROJECT

## WORKING PAPER 1 MARKET DATA & CONSUMER RESEARCH

**This working paper was produced for the Outdoor Tourism Marketing Project. It summarises available market data and research. The material is primarily for our use in analysing the sector and to inform our thinking and recommendations but may contain useful detail for project partners.**

### MARKET [1]FOR GENERAL ADVENTURE TOURISM

#### Market Value and Volume

Overall activity holidays have most appeal to people aged 20-44. The pre-family and family lifestage groups which form the core group for activity holidays are flat or declining in terms of population growth. The third age and retired groups are forecast to grow at a much faster rate. There are already more people aged over 60 than under 16's and by 2025 there will be more over 60's than under 25's.

[1] The North Wales Outdoor Sector Vision & Action Plan 2009-2015

Activity holidays have a broad appeal across ABC1/C2 groups although there is a strong peak among AB with 58% having experienced an activity break compared with 43% of the population overall.

Mintel's latest study reported that the main growth sectors in the activity markets are likely to be the following:

- Family adventure market
- Customers becoming more involved with packaging breaks as co-creators of holidays
- Short intense activity breaks as an alternative or adjunct to city breaks
- Strong growth still seen in higher quality combination of activity and luxurious

In terms of new opportunities Mintel also recognised that activity needs to be incorporated alongside lazing, shopping and sight-seeing (Flop & Fitness - activity/relaxation). It also highlighted that there is scope for giving more youthful activity holidays a 'middle-age makeover'. Mintel identified the following drivers:

- Interest in healthy life styles and wellbeing (amongst some market segments)
- A desire to experience something different (experiential travel), particularly ABC1
- Changing demographics, particularly in relation to the increasingly health conscious, environmentally aware ageing population
- Increasing levels of disposable income, which have helped to make taking part in activity tourism affordable (along with, in some instances, decreasing cost of equipment)
- Increasing awareness of activity tourism via the internet; better access to the countryside/coast
- Growth of tour companies specialising in field of activity tourism and
- Increasing professionalism in the of the sector
- Activity destinations are becoming more accessible via improved and low cost transport links with the growth of low cost airlines
- Greater awareness amongst consumer of the environmental impacts of tourism, particularly overseas travel, perhaps, leading to an increase in domestic UK tourism; also economic reasons for increase in the "stay at home holiday" market.

## WALES

### Implications of the research review

North Wales is a mature tourism destination with a historically strong market. Its natural environment has resulted in the development of outdoor activities and a consequent tourism offer. Extensive research has been carried out on the sector and its individual activities and various strategic documents produced identifying development needs.

In summary the priorities appear to be…

**Facilitating casual access**

Most activity holidays are self-organised and the market for casual participation is much bigger than the market for activity holidays where the activity is the main purpose. To encourage participation for tasters and dabblers access needs to be made simple and easy to participate in activities whilst on holiday without prior organisation. This means:

- Developing outdoor products and packages
- Developing an online / mobile booking system (i-try scheme?) to introduce people to activities
- Using TICs as a booking / information hub for local activities.
- Equipping accommodation providers with the necessary information about local activity opportunities
- Uniting under North Wales new branding – giving a better chance of attracting visitors

**Improving infrastructure**

North Wales has seen some significant investment in activity infrastructure in recent years. The need now is to concentrate on filling gaps and bringing facilities up to scratch to enable the full potential of this investment to be realised. Examples included in the documents researched include:

- The coastal path signage and promotion
- Promotion of cycle routes – for all abilities
- Low level footpath around the base of Snowdon
- Yacht berths and facilities along the coast
- Accommodation related to activity centres
- Supporting facilities - slipways, shelters, parking and toilets etc which make it easier for people to undertake activities
- A wider food offering
- Develop the connectivity of walking, cycling and other recreational activities between national and sub regional routes, such as the Dee Valley Way and the North Berwyn Way and continuing northwards to link with the Hiraethog Way and Purposeful Routes in Upper Conwy Valley.

## North Wales Visitor Profile[2]

North Wales accounts for 1% of the UK population but attracts 3% of domestic tourism nights. Tourism in North Wales generated £1.85bn in 2007 (£1.39bn of direct expenditure) and represents an important sector for the economy in the region, supporting 37,500 jobs (FTEs).

The region accounts for around a third of tourism in Wales, attracting a greater share of tourism than any other region in Wales. The North West sub-region accounts for around three quarters of the region's staying tourism and 60% of day visits.

In 2007, the region attracted an estimated 8m staying visitors, spending some 35m nights. Day visits, estimated at 17m. UK residents account for 90% of staying visitors, with the vast majority emanating from England. Key characteristics are listed below:

- Holiday tourism predominates (82%). Business tourism and VFR are relatively small.
- Half of all holidays are short breaks (1-3 nights) and only 8% were for more than a week. Most are additional holidays as opposed to main holidays.

[2] UK Tourism Survey, North Wales Visitor Survey 2004

- There are high levels of repeat business (82%)
- Most arrive by car (82%)
- Tourism is strongly seasonal with 69% of trips occurring in the summer 6 months.
- Average length of stay is 3.9 nights. Average spend per trip is £161.
- Half of all trips (46%) and a higher proportion of nights are spent in some form of self-catering accommodation. A quarter are spent in the homes of friends and relatives.
- Over half (56%) are from the ABC1 social classes
- The majority (88%) come from England, primarily from the North West and West Midlands. Only 9% are Welsh.
- Overseas visitors show a slightly different pattern and spend more, stay longer and are less likely to be on holiday. About half come from Ireland, France, Germany and the Netherlands and a further quarter from North America and Australia.

## North Wales Visitor Survey Summaries – Day & Staying 2011

| | UK Day Visitors[3] | UK Staying Visitors to Wales[4] |
|---|---|---|
| **Demographics**<br>**Lifestage segmentation** | Skewed to ABC1<br>Over 40% are Empty Nesters | Skewed to ABC1<br>2/5 Empty Nesters, 1/3 Families • |
| **Visitor from Wales to North Wales** | 46% visitor from Wales<br>Repeat visits are high. | Repeat visits account for 81% of all Staying |
| **New Visitors** | 13% from outside Wales are new to Wales. 6% of Welsh visitors visit for the first time | 12% overall and 15% are lapsed Visitors |

[3] Visit Wales - Tourism Visitor Survey 2011 - UK Day Visitors
[4] Visit Wales Tourism Visitor Survey 2011 - UK Staying Visitors

| | | |
|---|---|---|
| **Satisfaction with the trip** | 40% rated Wales 10/10 as a place to visit | 45% rated Wales 10/10 as a place to visit |
| **Best elements of trip** | Natural environment and people. | Natural environment and friendliness. |
| **Best elements of trip** | Commercial tourist facilities eg shops, food | Commercial tourist facilities eg shops and places to eat. |
| **Mobile internet access** | Nearly ½, 15% used during trip | Over ½, 31% used during trip |
| **Websites as information sources prior to trip** | 2/5 consulted website for info prior to trip | ½ consulted a website for info prior to trip |
| **Information Sources during the trip** | Over ½ use leaflets, ¼ use TICs | 3/5 use leaflets, 1/3 use TICs |

## Key Wales Visitor Market Segments

In order of size are:

- UK adult breaks (45%)
- Family holidays (20%)
- Activity-led holidays (15%)
- Visits to friend and relatives (10%)
- Overseas visitors (10%)
- Business tourism 5%

## Comparing North Wales to Other Places

To give a measure of how North Wales stacks up against the competition North Wales can be compared to four other destinations - South West Wales, Cumbria and the Lake District, Cornwall and Finistere in western Brittany. These areas are similar in size and nature of appeal and are generally considered to be successful destinations - conclusions are as follows:

- It gets less rainfall than the other destinations, and has an average amount of sunshine and average summer temperatures.
- It has a larger catchment population on its doorstep. Road and rail access is comparable to the other areas.
- The tourism offer is strong and more varied than in the other areas offering mountain scenery and coast with some unique features and icons and a higher incidence of designated landscapes, world heritage sites and Blue Flag beaches.
- It has more visitor attractions and a greater number of larger attractions. It can hold its own in terms of quality restaurants.
- The area has good and positive coverage and exposure in guidebooks and on the web and compares favourably with the other areas.

North Wales stands up relatively well compared to these benchmark destinations - in terms of the volume of tourism North Wales generally outperforms South West Wales but attracts lower levels of tourist activity than Cornwall, Cumbria and Finistere. There is a tendency for visits to be shorter and for spend per head to be lower although it is stronger on day visits. In other respects tourism profile appears to be very similar. The serviced accommodation stock is of similar size to the other areas but North Wales appears to have a smaller stock of self-catering accommodation and a much larger stock of caravan holiday parks and camp sites.

Given the positive results above it is perhaps surprising that North Wales doesn't perform better than it does. It suggests that perhaps the totality of the experience on the ground is less positive than it might be or that perceptions of North Wales lag behind the reality. There is a belief that North Wales has lost ground over the years and now lacks the aspirational appeal of Cornwall, Cumbria and Brittany.

## Wales Outdoor Tourism Market Data

'Achieving Our Potential 2006 – 2013' is the Tourism Strategy for Wales published by the Welsh Assembly Government. The majority of images included in The 2005 Mid Term Review are outdoors related: coaststeering (front cover), surfing, riding, walking and sailing – this is interesting to note since the current Head of Marketing at VW considers that the outdoors is not a dominant sector for Wales.

Activity Tourism was previously managed by a specific person within The Welsh Tourist Board who coordinated the production of the following outdoor activity strategies (Executive Summaries dated from 2003 to 2008). This role no longer exists and there are no plans to update these strategies – adventure/outdoor tourism strategy will be integrated within the new Tourism Strategy for Wales (currently being written) and there will be a role responsible for production and distribution of activity content.

**Fishing**

Angling for Growth, the Strategy for Fishing focuses on two priority market segments:-

- UK holiday anglers (pleasure anglers)
- UK fishing holiday and break takers (specialist anglers)

In addition, the following secondary market segments will be closely targeted:

- Fishing day visits
- Match fishing
- Overseas fishing holidays and breaks
- The corporate hospitality market

Evaluation of Fishing in Wales's National Parks (Visit Wales Fishing brochure2009) shows the break down for the type of fishing undertaken:

| ***Type of Fishing*** | |
|---|---|
| Game Fishing | 36% |
| Sea Fishing | 17% |
| Charter Boat Fishing | 10% |
| Coarse Fishing | 37% |

- 54 % stated that they had used fishing tackle shops whilst in the area.

- The average stay to the three areas was 9 nights per visitor. The average stay per general visitor to Wales following the VW 2006 Visitor Survey figures was 6. Average spend per person per night on accommodation and food was £34.25, with an additional average of £23.14 spent on fishing tackle and permits / licences - giving a nightly average spend per person of 57.39.
- Visit Wales's figures shows that the average spend per person per night in Wales for 2007 was £44.

**Walking**

'Best Foot Forward'; A Walking Tourism Strategy for Wales outlined the following about marketing walking visits to Wales:

- Little proactive marketing exists
- Marketing is currently fragmented and low key. Private sector marketing of walking holiday opportunities is equally fragmented and weakly resourced as a result of the limited marketing budgets of walking holiday operators and accommodation providers
- Positioned as a niche activity in national, regional, and local destination marketing (rather than the mainstream activity that research suggests it is for many visitors to Wales)

The Strategy puts forward the case that Wales undoubtedly has some of the best and most accessible walking scenery in the UK. It already has a good walking tourism product that is enjoyed by a great many visitors to Wales. The walking visit experiences that Wales offers are, however, currently no better managed, presented or promoted than in other parts of the UK. The aim of the 'Best Foot Forward' Strategy is thus to raise the standard of the Wales walking tourism product, and improve its presentation and marketing, to a level that will set Wales apart from competitor destinations, giving Wales competitive advantage, and a greater share of the UK and European Walking Tourism market.

This suggests scope to strengthen the marketing of walking in Wales through stronger, better resourced, and more co-ordinated marketing programmes.

**Watersports**

'Catching The Wave' 2004 reports that The BMF marinas & moorings audit 2003/4 shows the total number of known moorings by geographical location across the UK. Of these, 7,522 were located along the Welsh Coastline, representing 8.4% of the total. The 3 nearest areas of opportunity for the Welsh watersports industry are: Northern Ireland & Isle of Man (2,632), the Solway Firth to Merseyside (1,367), and ChepstowLands End (1,789), representing a total 5,788 (6.5%) of known moorings currently in the UK.

It is believed that the Republic of Ireland may also offer an opportunity based on existing fast-ferry provision. The under-utilisation of the Welsh watersports offer affords an opportunity for Wales to develop facilities and service delivery that will compete very favourably with existing overcrowded facilities in England, particularly in the South East.

**Equestrian**

'Saddling up for Success'; a riding tourism strategy for Wales. An estimated 800,000 riding occasions are taken by visitors in Wales each year with an estimated direct expenditure of £18.55m.

4 key riding tourism markets selected are identified:

- Riding Returners Second Holidays/Short Breaks – ABC1, aged 45+, medium to high disposable income, a growth market within the UK, predominantly women, travelling in friendship groups/alone, predominantly travelling without a horse
- Young Professionals Short Breaks – ABC1, aged 25-35, high disposable income, strong repeat visit potential, travelling in friendship groups/alone, may be travelling with or without a horse Executive Summaries 2 WTB Activity Product Strategies
- Riding Family Holidays – ABC, adults aged 25-40, (children up to mid-teens), low-medium disposable income, established market in Wales for all holidays, travelling without a horse
- Short Break/Second Holiday Horse Owners – wide range of SEGs, aged 25+, range of disposable incomes but priority on spending disposable income on equestrian activities, includes some riding returners and young professionals.

**Cycling**

Selecting the Right Gear Cycling Strategy for Wales suggests that the general cycling product in Wales should be developed and promoted. The first objective is to strengthen the availability and appeal of opportunities to experience local destinations in Wales by bike; this will aim to appeal to:

- the novice cyclist on holiday in Wales; the novice cyclist attracted to Wales by a gentle cycling package offer

- the more regular cyclist seeking to explore parts of Wales mainly by bike
- Experienced cyclists seeking to travel through Wales on a touring holiday.

**Adventure**
'Time for Action' is the an adventure tourism strategy for Wales (2002-8) designed to provide a clear framework for the development and promotion of Adventure Tourism in Wales. Marketing and information priorities for Adventure Tourism in Wales were identified as follows:

- A more focused and targeted national Adventure Tourism marketing campaign;
- A separate marketing campaign for sailing and marine leisure activities;
- Stronger coverage and positioning of adventure activities in Holiday Area brochures and web sites;
- The development of local adventure activities information web sites and manned information services - providing pre-visit and at-destination information to aid independent participation in adventure activities;
- A clear web site framework for Adventure Tourism marketing and information provision - to provide more comprehensive coverage and links at the local and national level; Positive and proactive PR for Adventure Tourism in Wales – to counter the negative publicity that usually arises from the high profile media coverage given to adventure activities accidents when they occasionally occur.

**Mountain Biking**
Wales's Mountain Bike Marketing Strategy 2012 – 2017 outlines that the market needs to broaden from focusing solely on enthusiasts on mountain bike dedicated visits to evolve to appeal to non-mountain bikers (samplers) and occasional mountain bikers (dabblers). By recruiting a more diverse group of mountain bikers (such as females, families with children, and under 25 year olds) it creates long-term stability of the market base because a larger proportion of the population can be accessed. Targeting the sampler group will be the biggest challenge and will require the most resources. There is generally a correlation between frequency of riding and level of ability so marketing should focus on the beginner and intermediate parts of the ability spectrum. Enthusiasts are communicated with effectively and economically through editorial in specialist mountain bike media and social networking media, both of which should increase where possible.

## North Wales – Outdoor Activity Product

**Value of North West Wales Adventure Tourism Market**

The Snowdonia-Active report 'The Active Economy' 2004 estimated the value of the overall Adventure Activity Sector in North West Wales at some £140 million per annum supporting some 8,400 jobs across the region (6% of all employment). The market for Adventure Tourism is growing and is predicted to grow at a faster rate than the overall tourism economy.

In terms of the product[5], North Wales is the base for three National Centres for outdoors. The outdoor education sector has a strong presence in North Wales. Some 73 providers are listed by AALS with a strong concentration in Gwynedd and Conwy. This sector appears to offer opportunities to become more accessible to the activity market beyond the main schools' sector.

In terms of the main activities, walking and rambling score highest in terms of participation nationally and in terms of activities undertaken on a trip to North Wales (either as a primary or secondary purpose). This is a mature market but there are innovations (such as 'geocaching').

Cycling is the next highest activity in terms of participation and both recreational cycling and mountain biking represent growth sectors. North Wales is known as a market leader in mountain biking with centres such as Coed y Brenin at the forefront of development in the UK. There is a strong rationale for continuing to develop the product and support infrastructure in the Region.

After walking and cycling, paddlesports and climbing/mountaineering have a similar level of participation in the UK and both offer strong growth prospects in North Wales. Paddlesports have lower equipment needs (and entry skill level) than many watersports and if proposed changes to river access are introduced in Wales then opportunities for growth will be boosted further.

In terms of climbing and related activities such as bouldering and scrambling it is important that the range of indoor facilities can be enhanced to provide introductory level sessions and alternative access during poor weather periods.

[5] North Wales Outdoor Sector Vision & Action Plan 2009-2015 Report 1

The outdoor sector is known to be dynamic and innovative. Niche activities within the outdoor sector, such as coasteering, can be an important element in terms of critical mass in a destination and also in terms of the profile of the area. It is important that Local Authorities and other bodies are flexible enough to accommodate emerging trends for appropriate and sustainable new activities and are able to respond to users' needs (eg through zoning) whilst avoiding conflict with existing users.

Conversion research for the Snowdonia Mountains and Coast Activity Guide in 2007 found that visitors undertook the following activities:

| ***Type of Activity*** | **%** |
|---|---|
| Walking | 39.5% |
| Coastal Activity | 23.3% |
| Cycling and Mountain Biking | 8.5% |
| Climbing | 7.8% |
| Bird Watching | 10.5% |
| Horse Riding | 2.6% |
| Fishing | 4.6% |
| Golf | 3.2% |

Staying visitors used the following types of accommodation:

| ***Type of Accommodation*** | **% Of Use** |
|---|---|
| Self Catering | 30.6% |
| Other | 11.1% |
| Camping | 20.1% |
| Hotel | 13.4% |
| Guest House | 24.6% |

Average spend per person including accommodation was £40.50

## North Wales Outdoor Activity Markets

**Independent Explorers**
Visit Wales has identified[6] 'independent explorers' within 2 hours drive as the key growth market for Wales. Independent explorers are looking for quality accommodation, are in search of new experiences, are more up-market and independent in mind and action.
This group is further subdivided into active, family and personal explorers. Research shows that these people account for a high proportion of Wales' visitors, are most susceptible to the Visit Wales message and exhibit the highest levels of satisfaction.

**Activity and Special Interest Holidays Market Segment**
The Three primary market segments for North Wales, which are relevant across the region are: UK family holidays, UK short breaks and activity holidays. The Activity and Special Interest Holidays market provides the dominant, but not necessarily the only reason for the visit. Success factors for this market are given as: good facilities, range of different activities, aimed at different levels of experience, range of accommodation needed but good food and quality facilities expected. Safety assurance essential.

**The Outdoor Activity Sector Market Segments**
Research7 undertaken has identified 4 main market segments that are common to all types of adventure tourism, based on people's interest in outdoor activity and the amount of time they devote to it (or them) during their leisure time whilst on holiday.

The segmentation[8] applies equally to individuals and groups as well as to day and holiday visitors. Families are most likely to be samplers, and possibly dabblers (although if access to a variety of activities is possible, then family members may pursue different activities during all or part of their stay). The mix of market segmentation varies by type.

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[6] Tourism Strategy North Wales 2010-2015

[7] ACK Tourism / TEAM in the Visit Wales Outdoor Wales Information Framework
[8] North Wales Outdoor Sector Vision & Action Plan 2009-2015 Report 1

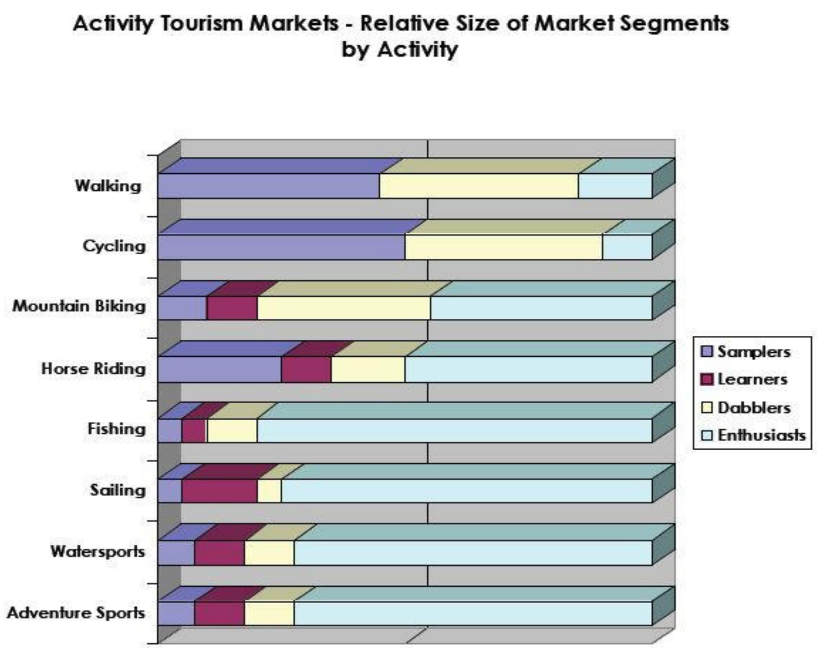
These segments can be used for the Ireland/Wales study. For Wales the growth segments would be tasters and dabblers with a continued effort on the enthusiasts who are well catered for via the national centres.

| Segment | Description |
|---|---|
| ***Tasters** | **People trying out an outdoor activity for the first time, or undertake on a very occasional basis** |
| Learners | People learning an outdoor activity, or improving skills |
| ***Dabblers** | **People who occasionally take part in an outdoor activity as part of leisure time or on holiday. They have some knowledge and skill, but are not regularly active** |
| Enthusiasts | People who regularly do outdoor activity, are keen and have a level of knowledge and skill |

The table here provides an (indicative) visual representation of the relative size of the market segmentation by activity.

The research suggests that the mix of market segments varies by type of activity for the adventure tourism sector in North Wales:

- The walking market has a high percentage of dabblers and samplers;
- Dabblers are a key market for cycling: mountain biking has a high no of enthusiasts/dabblers
- Watersports, particularly sailing, are dominated by enthusiasts and learners. There appears to be less of a dabblers market for watersports other than canoeing, dinghy sailing and surfing (which have a lower entry level skill requirement)
- More extreme adventure sports, such as climbing and caving, that often require a higher level of skill attract mainly enthusiasts



# IRELAND

## Implications of the Research Review

The following overview of the key markets and activities undertaken provide some guidance on the priority markets. Research tells us that visitors undertaking an active trip are more likely to spend more. Targeting these visitors has the potential to increase economic benefit to the project areas.

The domestic market is by far the most significant and the easiest to reach. 75% undertake activities whilst on their trip; a good number of which are enjoyed in other regions. A key objective would be to grow the share of this market. The British market also remains important due to the size and location of it. Although further away the market from mainland Europe should still be targeted but be less of a priority as research shows that they do participate in outdoor activities whilst in Ireland.

With so many repeat visitors there is a need to provide new reasons to visit, or to extend a stay. The scenery and natural environment feature prominently in the reasons visitors choose Ireland. Providing a menu of activities to allow visitors to get out and about in the countryside and to encourage them to stay longer should be a focus for marketing messages. The use of images depicting visitors enjoying themselves whilst doing some walking, water sports or cycling can help convey the opportunities.

Other areas of Ireland are better known and more established in the minds of visitors for outdoor activities. It will be difficult to compete with these areas and products. The project areas are more likely to attract the Samplers/Tasters, Learners and Dabblers, rather than the Enthusiasts. Marketing messages and images must be targeted accordingly.

Significant numbers of visitors stay with friends and family and it is important that the ‘locals’ are aware of what is on their doorstep in order for them to provide useful insights on how best to ‘entertain’ their guests. The majority of visitors use a car so suggested itineraries which include outdoor activities should be used to tempt visitors.

Research tells us that visitors continue to use the internet to plan and book significant elements of their trips. Activities will need to feature online on destination/regional sites as relevant and also link with accommodation providers as part of their ‘what to do’ sections. Social media will have an important role to play in raising awareness.

With events and festivals remaining a powerful driver, relevant outdoor/active events should be included in marketing communications. Where possible, new events should also be encouraged and over time established as these will provide further reasons to visit.

## Size of market and priorities

The majority of the tourism statistics available focus on the overseas markets to Ireland. The latest Failte Ireland (FI)[9] report from August 2012 indicates the following breakdown by key markets for the periods of January to July 2009-2012.

### Overseas Visitors to Ireland January-July 2009-2012 (000)

| | 2009 | 2010 | 2011 | 2012 | % change '12 vs '11 |
|---|---|---|---|---|---|
| **Britain** | 1,896 | 1,488 | 1,615 | 1,557 | -3.6 |
| **N America** | 577 | 526 | 592 | 566 | -4.4 |
| **Mainland Europe** | 1,424 | 1,125 | 1,322 | 1,343 | 1.6 |
| **Other areas** | 167 | 166 | 203 | 215 | 5.9 |
| **Total overseas** | **4,064** | **3.305** | **3,733** | **3,682** | **-1.4** |

We can also learn something about the value of the **domestic** market from 2009-2011 data[10] from FI.

- The domestic market is the biggest and represents 56% of visits, and accounts for 35% of spend.

[9] Overseas Visitors to Ireland January to July 2009-2012, 30 August 2012.
[10] Tourism Numbers 2009-2011(p), 12 June 2012.

- The British market accounts for 20% of trips and 18% of spend.
- The mainland European market accounts for 16% of trips and 26% of spend.
- The US market accounts for 6% of trips, but 15% of spend.

## Activities undertaken

The Activity Product Usage figures[11] from FI in 2011 tell us that

- 107,000 overseas visitors engaged in angling while in Ireland in 2011 spending €90m
- 740,000 overseas visitors claim to have gone hiking/cross-country walking in 2011 spending €649m. Around a third of these visitors stated that walking was an important factor in their choice of Ireland as a holiday destination.
- 173,000 overseas visitors engaged in cycling while in Ireland in 2011 spending €200m.
- The level of participation in golf by overseas visitors continues to grow in 2011 to 175,000 spending €178m.
- 71,000 overseas visitors engaged in some form of equestrian pursuit in 2011 spending €76m

This demonstrates the importance of the walking market to Ireland.

The table[12] below provides some insight into those activities undertaken by specific overseas markets. The British are more active in angling, walking and golf whereas those travelling from mainland Europe are taking part in all activities, but with fewer playing golf in comparison to British and American visitors.

[11] Activity Product Usage among Overseas Visitors in 2011 (Preliminary), August 2012
[12] Activity Product Usage among Overseas Visitors in 2011 (Preliminary), August 2012

| Overseas Visitors | Angling | Hiking/Cross Country Walking | Cycling | Golf | Equestrian |
|---|---|---|---|---|---|
| Nos. Engaging (000s) | 107 | 743 | 173 | 175 | 71 |
| **Share by Market (%)** | | | | | |
| Britain | 46 | 31 | 18 | 45 | 15 |
| M. Europe | 47 | 44 | 54 | 22 | 52 |
| *France* | *12* | *11* | *12* | *6* | *8* |
| *Germany* | *11* | *10* | *9* | *3* | *11* |
| N. America | 5 | 18 | 18 | 30 | 23 |
| Other Long Haul | 3 | 6 | 10 | 3 | 10 |

The Domestic market is not represented in this set of statistics for 2011, but we know from the figures detailed at the top of this report that 56% of all visitors are from Ireland that it can be safely assumed that significant numbers are likely to undertake some form of activity as part of their trip.

This is reinforced by a Tourism Adventure and Activity Update[13] from FI in 2009. This report advises us that 64% of participants in activities are domestic visitors. Furthermore 11% are from Britain, 17% from mainland Europe and 7% from North America. This report states that the activity tourism market in Ireland is worth €1.1 billion in 2009, made up of €653 million from overseas visitors and €404 million from the domestic market. Furthermore visitors who engaged in activity tourism are a high yield segment and spend 33% more than the average visitor. This reinforces the need to attract more active visitors.

[13] Tourism Adventure and Activity Update, compiled for a presentation on 3 November 2010.

The Tourism Adventure and Activity Update also provides a profile of holidaymakers engaging in activities as follows:

## Profile of Overseas Holidaymakers Engaging in Activities

Around two thirds of overseas visitors who engage in hiking/hillwalking, water-based activities or angling are on holidays. Around half of those cycling or engaging in equestrian pursuits are on holidays while a further third are visiting friends or relatives. Almost two thirds arrive in Ireland between May and August and they tend to stay longer than the average overseas holidaymaker. They are more likely to use a car and tend to travel more widely, B&Bs, hostels and self-catering accommodation are the most popular forms of accommodation. Activity holidaymakers are more likely than average to have been to Ireland before and tend to be aged between 25 and 34 years of age and are more likely to be travelling with family. They use guide books and tourist information offices more than the average overseas holidaymaker. In terms of satisfaction with activities, more than half of overseas holidaymakers who engaged in equestrian activities and hiking/walking expressed high levels of satisfaction with the quality of the activity – two in three rated the cost involved in hiking/hillwalking very satisfactory, this dropped to one in three for equestrian activities. Two in five rated the quality and price of fishing and cycling very satisfactory.

## Profile of Domestic Holidaymakers Engaging in Activities

Domestic holidaymakers who engage in activities generally travel in April to September (60%) and two-thirds are on short breaks (1 – 3 nights). However, those on longer holidays (4+ nights) are more likely to participate (60% - rising to 64% of those staying 6 or more nights). **69% holiday on the western seaboard** and an above average number of them are on family holidays (45%). The biggest cohort of domestic holidaymakers engaging in activities is between 35 and 54 years of age.

This report also provides some insight into product bundling, ie other activities engaged in.

| | **Hiking/walking** | **Water-based** | **Angling** | **Cycling** | **Equestrian** |
|---|---|---|---|---|---|
| **Hiking/Walking** | 100 | 51 | 24 | 61 | 42 |
| **Water-based** | 4 | 100 | 13 | 8 | 10 |
| **Angling** | 3 | 23 | 100 | 5 | - |
| **Cycling** | 7 | 12 | 4 | 100 | 8 |

| | | | | | |
|---|---|---|---|---|---|
| **Equestrian** | 2 | 6 | - | 3 | 100 |

It is interesting to consider that this report advises us that the majority of the domestic market take their active break on the western seaboard. The attraction of this area will be difficult to compete with, but it demonstrates the need to raise awareness of what activities can be undertaken in the project areas.

Statistics and insights on target markets and activities undertaken are provided in a number of FI reports, and from Domestic Holidays Research[14] from July 2011 to June 2012 we learn that 14% visited Dublin on their recent trip, 11% visited the South East and 8% visited the East Coast and Midlands. Ireland's West had the biggest share with 18% which to some extent ties into the insight detailed above about the attraction of this part of the country. This report also details that only 25% did not undertake any activity whilst on their trip. Out of the 75% who did undertake an activity 23% did some hiking/walking, 20% took part in water-based activities, 9% played golf, 8% cycled, 6% fished and only 3% went horse riding. 75% is a significant chunk of the domestic market that the project areas have the potential to attract. This market must not be overlooked as it provides the biggest volume of trips and spend.

## Visitor Attitudes

A Visitor Attitudes Survey[15] was undertaken in 2010 surveying a cross section of overseas visitors from the main markets. The report informs us that the Irish people remain a key advantage, with scenery also identified as a key advantage. The unspoilt environment also features as a key consideration.

This survey tells us that hiking/cross country walking is the premier product, mentioned more or less consistently by one in every four between 2006 and 2009, increasing to 31% in 2010. This is a particularly popular activity for Mainland Europeans, with 40% participating in 2010, up from 33% in 2009. Net satisfaction with the quality of this activity is very high at 94%. Reported participation in other activities, such as golf and cycling, is quite low (5% for each, as in 2009). Among the small minority (3%) participating in equestrian activities, satisfaction with quality (86%) is assured but remains more tenuous regarding price (68%).

[14] Domestic Holidays Research July 2011-June 2012, July 2012.
[15] Visitor Attitudes Survey 2010

With scenery and the unspoilt environment featuring strongly in the advantages a holiday in Ireland can offer, and the importance of walking as an activity undertaken, consideration should be given to linking these offerings. Getting up close and walking in the wonderful scenery is definitely a benefit to those with that inclination. The same could also be said for cycling, although currently much fewer are undertaking this activity.

Visitor Attitudes Surveys were also undertaken regionally and from the South East report[16] we learn that 73% of domestic visits were repeat in comparison to 42% from Britain, 20% from Europe and 15% from North America. This loyalty from the domestic and the British market needs to be taken into account in marketing activity. These people need to be provided with new reasons to return and the inclusion of activities in marketing messages may help encourage return visits or extend stays. We do need to note however that this report does suggest that activities are not a main reason to visit the area, instead specific events and festivals and the beautiful scenery provide the main reasons. This report also informs us that the natural environment and the friendliness of the people rate highly as aspects of the offering. It may be that since there are few outdoors activities on offer or marketed then visitors may be unaware of these opportunities to get outdoors.

A further report on Tourism to the South East in 2010[17] tells us that almost half of British visitors to the area are visiting family and friends. This highlights the importance of ensuring that locals know what there is on offer to entertain their guests. The same pattern can be found in the East and Midlands[18] with 60% of visitors staying with family and friends. Less visit friends and family in the Dublin[19] area (26%).

## Touring by car

Various research reports indicate that the use of a car is an important aspect of a holiday in Ireland, with 51% of British visitors[20] either bringing a car or hiring one. 46% of North American visitors[21] hired a car and 62% of Germans[22] either hired or brought their own. Exploring

[16] Preliminary Results of Visitor Attitudes Survey in South East June-October 2011
[17] Tourism to the South East (Preliminary Data) 2010, 5 September 2011
[18] Tourism to East and Midlands (Preliminary Data) 2010, 5 September 2011
[19] Tourism to Dublin (Preliminary Data) 2010, 1 September 2011
[20] GB Market Profile, Tourism Ireland
[21] USA Market Profile, Tourism Ireland

Ireland by car allows visitors to get off the beaten track more and provides a good opportunity to get out into the countryside. Details of what activities are on offer in the project areas should be included as part of the marketing to target those touring Ireland.

## Channels used

From Tourism Facts 2009[23] we can see that 84% of overseas holidaymakers to Ireland use the internet to book or purchase some element of their holiday to Ireland. 79% visited air/sea carrier websites, 24% visited accommodation websites and 14% visited both general holiday search portals and Tourist Board sites. 97% went on to book air/sea tickets and 74% booked accommodation. A further 27% booked car hire.

The Tourism Ireland profiles[24] reinforce these findings. In 2010 88% of the GB market using the internet to book part of a trip of which 83% booked air/sea tickets and 57% booked accommodation. Only 70% of North American visitors used the internet to book part of a trip of which 66% booked air/sea tickets and 57% booked accommodation. 79% of German visitors used the internet to book part of their trip of which 76% booked air/sea tickets and 56% booked accommodation.

With so much being explored and booked online it remains important that activities are included on destination websites and are linked to accommodation provider sites where relevant.

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[22] German Market Profile, Tourism Ireland
[23] Tourism Facts 2009, 2 August 2010
[24] GB, USA and German Market Profiles, Tourism Ireland