

OUTDOOR TOURISM PROJECT:  
ASSESSMENT OF THE POTENTIAL OF  
OUTDOOR TOURISM & MARKETING  
RECOMMENDATIONS

BLUE SAIL ▶  
VISITORS PLACES DESTINATIONS

November 2012



SOUTHERN & EASTERN  
Regional Assembly  
Promising Our Region



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## INTRODUCTION

Blue Sail were appointed to :

- ▶ Undertake a baseline study of outdoor providers in 3 areas in Ireland (Dún Laoghaire Rathdown, Kildare and Kilkenny) and 2 areas in Wales (Conwy and Gwynedd)
- ▶ Assess the potential in each area for outdoor tourism
- ▶ Make recommendations for joint marketing

Outdoor Tourism is defined for this project as ***comprising visitor participation in outdoor activities either as part of a holiday or day trip, or as the main activity.***

The project involved the steps shown in the diagram on the right.

This report is the summary of our findings, analysis and recommendations. More detail can be found in the working papers we produced on:

1. Market Data & Consumer Research
2. Regional & National Marketing
3. Trends
4. Comparator Research

We also produced a database of those providing activity and outdoor tourism experiences, which can be used by the partners in future.



## MARKET ANALYSIS

### The Outdoor Tourism Market

Adventure and activity tourism is a growing sector as people look to holidays and breaks delivering engaging and participative experiences rather than passive sightseeing. 26% of global travellers are estimated to take activity holidays.(1)

This has inevitably led to many national tourist boards responding by developing and promoting outdoor tourism either as part of core positioning or as a leading offer.

High adrenalin activities are only a small part of the market but have helped to profile destinations such as New Zealand and Norway. The big opportunity, however, is in ‘soft adventure’ which makes up 90% of the market (2). Activity holidays are becoming more ‘mainstream’, attracting more women, more over-50s and more families (3).

Escaping the pressures of everyday life, an opportunity to make new friends and self-improvement are three of the most popular reasons for going on an activity holiday (3). The most common activities – for activity holidays in Europe - are walking/hiking (38%), cycling (23%), watersports (18%), mountaineering (8%) and mountain biking (7%) (4).

The economic downturn has seen many more UK residents switching their choice of holiday away from international travel to UK destinations – providing a real opportunity for the activity holiday sector. This also fits with a trend to be ‘greener’ in lifestyle (including holidays) and to explore / experience the exceptional natural environment offered by parts of the UK.

(1)World Tourism Organisation

(2)World Adventure Travel Trade Association

(3)Mintel Report: Activity Holidays - UK - February 2010

(4)World Adventure Travel Trade Association

### Market Segments

The North Wales Outdoor Sector Vision & Action Plan 2009-15 contains a useful way to think of the outdoor tourism market based on motivation and experience. The segments are shown in the table below.

Enthusiasts tend to look after themselves – they know where the best places are for their activity and use specialist media channels and peer to peer communication to keep up to date.

Learners clearly need an infrastructure of courses and qualified instructors, but it is relatively easy to package and promote the offer to them.

Tasters and dabbles are where the most significant growth opportunities are.

In addition to outdoor market segments both Ireland and Wales have best prospect visitor segments which are relevant for outdoor breaks, providing the opportunity for our areas to take advantage of national promotion activities. More of this later within the Marketing Recommendations section.

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

## Trends

The table below unpacks a number of key trends within outdoor tourism and general holiday-taking.

Trend	What it means for our areas	What it means for marketing	Most relevant segment
<b>Extreme/hard core</b> - triathlons, challenge races, free climbing etc	New events and expand existing. Most relevant to Wales because of infrastructure and maturity of the sector.	Niche market but could be used to generate good PR - photo opportunities and wider news coverage. Supports the outdoor branding as a main player.	Enthusiasts would participate, would inspire dabblers for activity at lower level.
<b>Desire for easy</b> - info & booking, also taster sessions, thrills without danger (eg Go Ape)	Most relevant for product development/business development. Information must be easy to find and use. Centralised booking. Relevant to both Wales and Ireland. All types of activity.	Clear, easily navigated websites with the right content and good functionality. At all levels from individual provider to national destination sites. Also clear articulation of the offer across all channels.	Taster and learners
<b>Wilderness refined</b> - good food easily available, nice places to stay, drying rooms	Collaboration with accommodation and other tourism providers. Relevant to all areas.	Packages. Links and information. Good opportunities for press trips	Sub-segments of tasters, learners, dabblers.
<b>Box ticking / achievements</b>	Need to have achievements which are worth ticking boxes on. Most relevant to Wales and DLR.	Promoting 'best ofs'; top 5s; giving stats eg times, league tables. Making it competitive. Social media useful platform.	All segments. But probably a sub-segment of each ie who care about external perceptions
<b>Self-satisfaction / self-actualisation</b>	Offer of 'pure' experiences ie remote, getting close to nature, unpackaged. Or very challenging experiences. Or the desire to learn something new. Challenging and learning experiences will need packaging. Relevant to all our areas, but mostly to Wales.	Subtle messages in marketing communications. Promotion of packages via web and directly by providers.	Learners, dabblers and enthusiasts. Internally referenced.

Trends (cont...)

Trend	What it means for our areas	What it means for marketing	Most relevant segment
<b>Showing off</b> - where I went & what I did	Most relevant to Wales and to DLR as part of a Dublin break	Social media channels – use of # on twitter, Flickr, destination or provider Facebook pages.	All segments from taster to enthusiast
<b>Active Greys</b>	Opportunity for all our areas	Marketing communications must not be too young or patronising – images, tone	All segments
<b>Slow Travel</b> – opportunity to relax, authentic experiences, get to know a place and its people	Particularly relevant to Kildare & Kilkenny Packaging of activity plus other experiences	Packaging. Promoting what else there is to do. Tone of voice and images important	Tasters and dabblers
<b>Family bonding</b> – quality time with each other and with the kids	Activities for different interests, skill levels, ages. Boating, walking and cycling particularly relevant. Packaging with accommodation	Social media channels, images and messages important <i>“activities are a great way to keep the kids happy...”</i>	Tasters, dabblers and learners
<b>Staycation</b> – holidays from home or within country	Domestic market becomes big opportunity	Present offer as more than second-best. Easy/cheap/fun way to have a short break, get away. Also better for environment, although as an underlying message	Tasters and dabblers

### Market Analysis: Ireland's Market for Outdoor Tourism

There is no reliable, comprehensive data on tourism – or activity tourism - to Dún Laoghaire Rathdown, Kildare and Kilkenny.

Ireland as a whole receives around 3.7M international visitors each year. The GB market is 42%, US 36% and N Europe 15%.

Dublin and the South West are the most visited regions.

When it comes to activities, walking & hiking are by far the most common with almost three-quarters of a million people taking part. Cycling, golf and angling are also popular.

Tourists from within Ireland make up around 56% of all visits and while data is not available, it can be safely assumed that significant numbers participate in activities.

Specific research into Adventure & Activity tourism suggests that 64% participants were domestic, 11% from GB, 17% from Europe and 7% from N America.

Perceptions about outdoor tourism in Ireland are not available but visitor satisfaction research shows high levels of satisfaction with the walking experience and the importance of scenery and environment for that offer.

More recent research done for the new *GB Path to Growth* strategy suggests that Ireland is not seen as having a particular strength in outdoor tourism.

However, in 2009 and 2010, Ireland has been ranked in the Adventure Travel Trade Association's Adventure Tourism Development Index as one of the top ten developed countries in the world with the potential to become a major adventure tourism destination.

The level of repeat visits to Ireland is notable, providing a relatively easy market to target for new experiences given their high awareness and loyalty.

### Market Analysis: Wales' Market for Outdoor Tourism

There is more general visitor data available for North Wales as well as specific studies on adventure tourism in North West Wales.

North Wales gets around 8M staying visitors each year from the UK, and 17M day visitors. Three-quarters of staying and just under two-thirds of day visitors visit North West Wales. The vast majority (88%) come from England – mostly from the North West and West Midlands. And most are coming for a short break.

Only 15% are activity-led holidays but based on national patterns, it is reasonable to assume that activities will be undertaken by a significant number of others. This is supported by conversion research for the NW Wales brochure which shows 40% of people go walking, 23% undertake coastal activities, 8% cycling and 8% climbing.

Adventure tourism is a significant sector in North West Wales worth £140 million pa, supported in part by 3 national centres.

### Conclusion

The available consumer data and market intelligence for outdoor tourism is limited. For Ireland in particular, there is a lack of area specific visitor data to identify the existing general tourism market which could be tapped. Nor is there any data on domestic trips from Dublin or research among Dublin residents on their perceptions or attitudes to engaging in activities in the project areas.

While there is more visitor data and previous research for North West Wales there is little on consumer expectations, perceptions and satisfaction with the outdoor experiences on offer.

It would be useful to address these gaps where possible, however we can confidently say that the outdoor tourism market presents new opportunities to those destinations offering the right experiences.

### PROJECT AREAS AUDIT & OVERVIEW

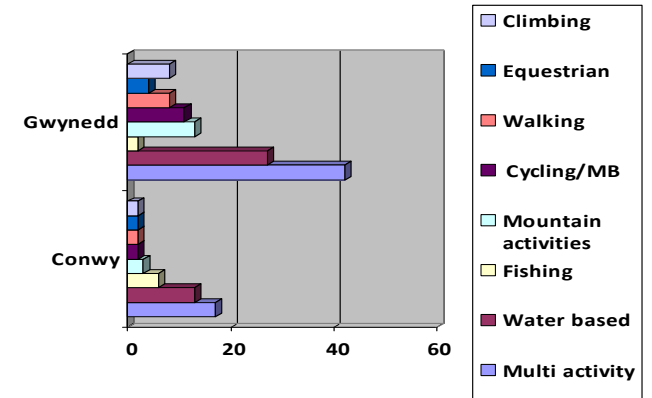
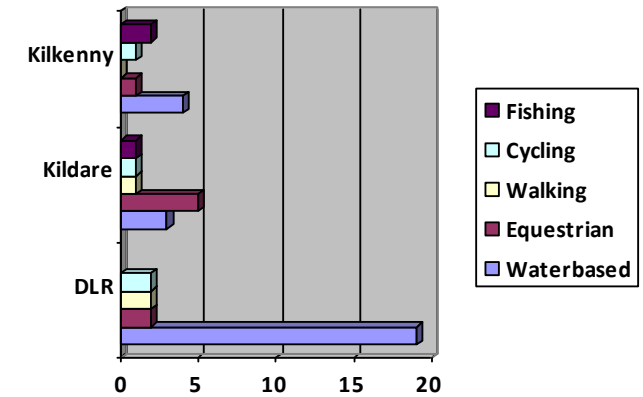
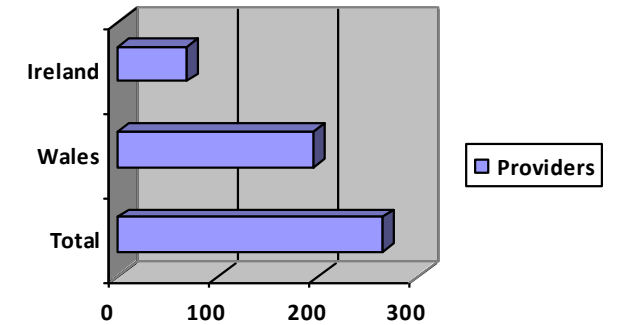
We identified 264 outdoor tourism businesses across the project areas – 68 in Ireland and 196 in Wales.

The breakdown among the areas and types of business is shown in the charts opposite. It is immediately clear that the sector in Wales is much more developed than that in Ireland. It is also obvious that the types of activities vary markedly across the partner areas.

We identified critical success factors from our comparator work and from our knowledge of successful outdoor destinations. These are shown, with our assessment of how Ireland and Wales currently perform, in the table below.

There are, we know, individual elements that perform exceptionally well, and variations among the different areas, but here we are simply illustrating how the areas measure up across the piece as an outdoor destination.

CRITICAL SUCCESS FACTOR	IRELAND	WALES
Established destination with good tourism offer (Inc food, accommodation)		
Natural outdoor assets		
Vibrant business sector		
Proximity & size of population		
Making it easy for visitors		
Skilled outdoor instructors & guides		
Specific outdoor 'brand'		
Events programme (linked to brand)		
Great customer service / welcome scheme		





## Comparator Research

We looked at 16 outdoor tourism destinations which we thought might provide lessons and ideas for the project areas:

### Coastal Activities

- ▶ Isle of Wight
- ▶ San Francisco
- ▶ Stockholm & Gothenburg
- ▶ English Riviera
- ▶ Vancouver Island



### River Valley

- ▶ River Wye
- ▶ Stratford-upon-Avon
- ▶ Scottish Canals
- ▶ Brittany
- ▶ French Rivers



### Multi-activity

- ▶ Fort William
- ▶ Lake District
- ▶ Chamonix
- ▶ South Dakota
- ▶ Blue Mountains
- ▶ Queenstown



Our Comparators Working Paper provides an overview of what each of these areas is doing and what we can learn from them.

Here is a summary of ‘top ideas’ which are relevant for the project areas:

- Claim distinctive territory – “we are the place for...”; named trails, get the branding and positioning right
- Images and descriptions – clear and strong
- Highlight viewpoints that are only available during activity
- Events to support branding and create awareness and visits
- Practical information - how to book, where to stay
- Inspire & give ideas - recommendations, top tips, to-do lists, meet-the-locals
- Creative packages – special offers
- Transport – creative approaches, inclusive packages, pick-ups and drop-offs, deliver bikes
- Easy booking - priced, quick quotes, flexible options, online booking
- Extend / Enhance the experience – culture, attractions, joint-ticketing, wildlife, organised safaris, work with non-tourism businesses
- Rounded experiences – importance of food, accommodation, retail etc
- ‘Snackable’ content – packages, ideas, tips - for consumers and for others to carry

## Opportunities

The audit and overview suggests that the opportunities for each of the areas are very different - because of their natural assets, location and maturity of their outdoor sector.

For Wales the potential lies more towards marketing the offer more effectively, supported by development of the product.

To realise its potential Ireland will require investment in product and business development supported by marketing of what is currently on offer, developing and extending this over time.

## Positioning

### Conwy and Gwynedd

We think that the main opportunity for Wales is to promote Conwy and Gwynedd as one destination for outdoor tourism; branding, repositioning and packaging the offer for a new larger dabbler and taster market which is where growth potential lies; and continue to inspire and cater for enthusiasts via the infrastructure of skills, centres, events and the quality of the destination offer



***NORTH WALES ... THE BEST OUTDOOR ACTIVITY DESTINATION IN THE UK (AND AMONGST THE BEST IN EUROPE) – VARIETY, BREADTH, DEPTH, QUALITY.***



### Kilkenny & Kildare

For Kilkenny & Kildare we see the opportunity lying in the Barrow Valley, which is already a focus for investment and development. We think that the Barrow Valley, with walks and cycle routes along the Grand Canal and Barrow River, kayaking on the water, and a focus on activity hubs at key strategic locations such as Athy and Graiguenamanagh, is where the potential for outdoor tourism lies.



***THE BARROW VALLEY TRAIL – THE BEST PLACE IN IRELAND FOR MEANDERING, GENTLE LANDSCAPES, WOODED VALLEY, ON/BESIDE THE WATER, SLOW TRAVEL***



### Dún Laoghaire Rathdown

For Dún Laoghaire the best opportunity lies in watersports and water-based activities along the coast. The Dublin Mountains provide a secondary opportunity.



***DÚN LAOGHAIRE – DUBLIN BAY'S WATERFRONT***



## Product Development

Our project is focused on marketing rather than product development, but we believe for each of the areas to realise their potential they each have to deliver an outstanding visitor experience. It is clear from the assessment against the critical success factors on page 8 that there are elements where the project areas fall short. Various things also emerged from our familiarisation trips to the destinations and our research into the visitor experience.

For **Wales** the priorities we recommend you consider are:

1. Easy booking – online and/or a hub in the destination, priced options, flexible packages, availability etc
2. Better signage, information and orientation
3. A detailed infrastructure review to identify and address specific issues such as better accommodation at Pwelli to match the sailing offer and improved connection between Conwy town centre and the marina
4. Improvement in service, welcome and food offer

For Kilkenny & Kildare the priority is to develop infrastructure along the Barrow Valley Trail.

For Dún Laoghaire the priority is to review and develop the infrastructure to support the development of watersports. This will include:

- ▶ Launching and landing facilities
- ▶ Changing facilities

In the Dublin Mountains there are issues regarding the infrastructure of bike trails, bike hire and transport.

We recommend this is picked up and addressed in the Dublin City Plus Development Plan.

For both areas access is a significant, multi-dimensional issue which will require addressing at different levels.

Ideally an Outdoor Access Code should be in place for the benefit of both activity participants and landowners.



## MARKETING RECOMMENDATIONS

This section of the report gives you our recommendations for marketing the outdoor tourism offer in the project areas.

We cover:

- ▶ Objectives for your marketing strategy
- ▶ Target Markets
- ▶ Positioning
- ▶ Marketing the Wales' areas
- ▶ Marketing the Irish areas
- ▶ Cross-area collaboration which could be supported within the Outdoor Tourism project

### Objectives

Clearly the ultimate aim of marketing is to generate visits and spend. However we recommend that you have more specific objectives for the Marketing Strategy produced within this project. We think your marketing activity should:

1. Support development of outdoor tourism experiences that appeal to target markets
2. Strengthen collaboration during the project, and as a legacy
3. Enable share experience and learning from each other
4. Promote the current offer to best prospect target markets
5. Where appropriate collaborate on promotion
6. Capitalise on regional and national tourism promotional channels



## Best Prospect Markets

In addition to the outdoor segments we have already mentioned there are specific tourism segments – developed by the national tourist boards – that it makes sense to think about as targets. This will help access the significant marketing activity undertaken by the national boards.

### Fáilte Ireland and Tourism Ireland Segments

Fáilte Ireland and Tourism Ireland have identified two relevant segments for Ireland which are relevant to the Irish project areas:

- ▶ Social Energisers for Dún Laoghaire Rathdown and
- ▶ Great Escapers for Kildare & Kilkenny.

More about these segments can be found in the *GB Path to Growth* strategy but in summary:

**Social Energisers** - are young , 20s and 30s, groups of friends primarily interested in city breaks and looking for days packed with activity and adventure and lively, fun nights. Dublin is already attracting these people and Fáilte Ireland has identified this segment as offering the best prospect for growth. It is also looking to refresh and extend the Dublin brand which provides an ideal opportunity for Dún Laoghaire to take its outdoor tourism product to market.

**Great Escapers** - are younger couples, some with babies and young children, primarily interested in a relaxing, rural holiday where they can connect with the landscape and soak up its beauty. They want to get off the beaten track – but they are looking for a bit of a “wow” factor too. They are also looking for ancient sites, landmarks as well as authentic pubs and eating places.

### SOCIAL ENERGISERS:



*Young, fun-loving urban adventurers, looking for Excitement Adventure, Packed days, Activities – the “wow” factor*

### GREAT ESCAPERS:



*Younger couples – some just starting a family – looking for a relaxing, rural holiday to take time out, enjoy the great outdoors & reconnect with each other*

### Best Prospect Markets (cont...)

#### Visit Wales Segments

Visit Wales has identified the **Independent Explorer** segment as the priority market for holidays in Wales. This segment includes people at all life stages, 30+, families and post-family.

They are independent in thought and action – these people don't follow the crowd. They like to visit places which offer something different and authentic.

They are very active and enjoy learning and participating in new things. They are relatively affluent.



#### Outdoor Project Segment Summary

The table opposite brings together the outdoor segments with the tourism segments.

In terms of geographic location; the three Irish areas should focus their domestic marketing on Dublin. Their tourism segments from GB and other international markets (Fáilte Ireland are confident the segments can be extended to other markets).

For Wales the English market is key, particularly the North of England because of proximity.

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## Marketing Gwynedd & Conwy

***NORTH WALES ... THE BEST OUTDOOR ACTIVITY DESTINATION IN THE UK (AND AMONGST THE BEST IN EUROPE) – VARIETY, BREADTH, DEPTH, QUALITY.***

Outdoor tourism marketing in Gwynedd & Conwy includes:

- ▶ Promotion by the Snowdonia Mountains & Coast marketing area (Gwynedd Council)
- ▶ Promotion by North Wales Tourism Partnership (NWTP) through general destination promotion and an outsourced adventure tourism website (Adventure North Wales)
- ▶ Marketing by Visit Wales
- ▶ Individual businesses who market their own services

These channels provide promotional opportunities for the outdoor tourism sector, but a strong, clear branding and positioning is required to run across all.

Another key piece in the jigsaw is the work commissioned by NWTP on a brand for outdoor tourism in North Wales. The draft strapline is *“at the heart of adventure”*.

Given the complexity of organisational relationships we recommend that

1. **Establish a strong Outdoor Tourism Partnership** with the outdoor businesses, tourism organisations and stakeholders in Gwynedd and Conwy mirroring the current delivery structure for this project ie led by the tourism team in Gwynedd Council
2. Gwynedd & Conwy’s outdoor tourism offer should be given a **clear, strong brand** based on the positioning we have identified. We recommend you review the wider branding work to make sure it will deliver the outstanding claim you have.

3. **Direct Promotion:** the experience in Gwynedd & Conwy is market ready, but given that budgets are likely to be small we recommend you focus on PR (press releases, press trips and media relationships) and social media as the most cost-effective way to reach your target markets.
4. **Promotion using other channels:** We also recommend that you use the channels provided by Visit Wales and VisitBritain to extend your reach, by providing them with content (copy, images, video, press itineraries, competitions, packages) which they can use.
5. **Promotion via business sector:** Work with the businesses in the outdoor sector encouraging them to use the branding, the marketing collateral, develop packages for the dabbler and taster markets, cross-promote each other on the web and social media channels.







## Marketing Dun Laoghaire Rathdown and Kildare & Kilkenny

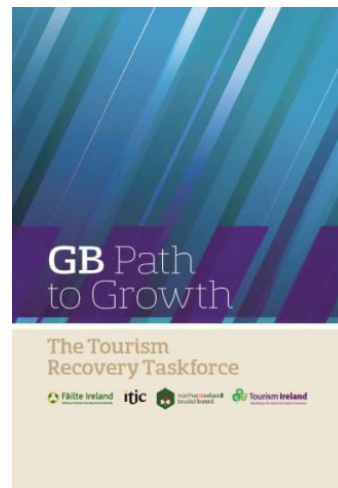
### DÚN LAOGHAIRE – DUBLIN BAY'S WATERFRONT

### THE BARROW VALLEY TRAIL – THE BEST PLACE IN IRELAND FOR MEANDERING, GENTLE LANDSCAPES, WOODED VALLEY, ON/BESIDE THE WATER, SLOW TRAVEL

Outdoor tourism in the two Irish areas - Dún Laoghaire Rathdown and Kildare & Kilkenny - sits within a promotional context of international marketing delivered by Tourism Ireland, domestic marketing by Fáilte Ireland and local destination promotion run primarily by the local authorities. Outdoor tourism does not feature heavily in any of the current promotion of the areas, undoubtedly reflecting the current limited offer.

Fáilte Ireland and Tourism Ireland's new strategic approach, outlined in *GB Path to Growth*, is based on extensive primary research and designed to reverse the decline in GB visitor numbers and reposition Ireland based on experiences rather than destinations or products.

This new approach provides a clear strategic framework for the Irish areas.



Given this context and the current outdoor offer we recommend:

1. **Fit with GB Path to Growth Strategy** - ensure that both product/experience development and marketing fits with the new GB Path to Growth strategy ensuring that new products and experiences fit within the priority experience pillars of *Vibe of the City* for Dún Laoghaire, and *Getting Active in Nature* for Kildare & Kilkenny.
2. **Fit with Dublin City Plus Strategy** - Dún Laoghaire Rathdown must also fit with the Dublin City Plus strategy which Fáilte Ireland is pursuing to reposition Dublin with an extended offer. This provides a huge opportunity to extend reach into international markets to Dublin.
3. **Positioning & Promotion** - While the current offer is limited there are still experiences, businesses and products which can be taken to market. These should be articulated using the positioning we recommend and described in ways which will appeal to the recommended target markets, and promoted through local, regional and national channels.
4. **Be Realistic** - Promotion should however be realistic in terms of what is available. As the outdoor tourism offer increases over time, then the marketing can be stepped-up.
5. **Exploit Existing Channels** - A concerted effort should be made to feed content on a regular basis to Visit Dublin/Fáilte Ireland and Tourism Ireland to exploit their channels. This is an on-going task.
6. **Outdoor Tourism Business Networks** - Develop and support the creation and operation of outdoor tourism business networks in each of the two areas. Businesses that deliver the products, services and experiences will need support to develop practical skills, marketing capability and collaborative working.

## Marketing Collaboration

Each of the 3 'marketing areas' ie Gwynedd & Conwy, Dún Laoghaire Rathdown and Kildare & Kilkenny, are very different in terms of their natural assets and product offer, their maturity as a destination, and their best prospect markets. Because of this we do not recommend that you pursue a cross-project marketing campaign. In our view this would not be a good use of resources and spend, and would not benefit any of the areas.

However, we do think the project could support a range of marketing activity which would bring benefits during the project and provide a legacy. These fall into 3 categories:

- ▶ **Marketing Capacity**– we think the Outdoor Tourism Project provides a valuable opportunity for knowledge sharing and marketing capacity building to fill the skills gaps and engender strong relationships which can provide a legacy for the project
- ▶ **Promotion** – while we do not recommend a marketing campaign for outdoor tourism in our 3 areas, we do think this project can support the development of essential marketing building blocks and materials for effective marketing in future
- ▶ **New Product Development** – we have identified a range of location-specific product developments but there are also opportunities relevant to both countries which could be usefully supported

## Marketing Capacity

1. **Twinning Programme:** the matching of specific towns, villages or businesses in Wales with counterparts in Ireland with the aim of developing a working relationship between them to share expertise, learn from each other and co-promote to their residents and visitors.

2. **Learning journeys:** arrange trips between project areas so that businesses can experience first-hand the visitor offer. This should be extended into learning journeys taken by businesses and those who support the sector, to comparator destinations. These comparator learning journeys should involve groups from Wales and Ireland to encourage networking and professional relationships. The approach to the journeys should be structured so that participants conduct research in advance, capture information and learning in the destination and be prepared to provide feedback to their peers after the visit. It should focus on outdoor activities and the wider tourism offer.
3. **Marketing skills development:** from our marketing review of individual outdoor tourism businesses we think there is a need to develop marketing skills. This could be done through joint workshops, apprenticeships, job placements, secondments and action learning sets. While all of these could be done within Wales or Ireland, there are advantages of taking people outside their area to broaden their learning and build mentoring relationships.
4. **Consumer research:** within our project there was limited opportunity for primary research so we used existing research. We think there is a need to undertake research among consumers to gather intelligence on current perceptions and proposed developments. The research needs are not the same across the project areas, so it is not just a case of developing one brief. There are however advantages to commissioning one research agency to undertake research against two (or possibly three) separate and clearly defined briefs. We recommend that Wales undertakes research among the dabbler and taster consumer markets in North England to assess how the area is perceived as an outdoor destination, how it is rated, branding and key messages. For Ireland the most useful research would be among Dublin residents to assess perceptions of the areas, attitudes among different segments, barriers to visiting, branding and key messages.

## Promotion

- 1. Collateral** – all marketing communications to consumers and the travel trade will require high quality collateral, which is currently fragmented in Wales and does not exist in Ireland. We recommend that you commission photography to make sure you have excellent copyright-free images of people engaged in relevant outdoor activities in each of your areas. These images should clearly illustrate the destination as well as the activity and should fit the target market as well as the positioning. We also recommend that you produce 'snackable content' ie itineraries, top facts, lists of top things to do, examples of copy describing the activity and the destination. This collateral can be made into a 'toolkit' available to your businesses; can be used in promotion by the local authorities, regional tourism partnerships and national tourist boards. The resource can be added to over time, and provide an important legacy for the project.
- 2. Trade & Consumer Outdoor Shows/Exhibitions** – the Wales' offer is market-ready, Ireland's is not. But there are opportunities for Wales to have a presence at shows such as the Outdoors Show or the Active Travel Show (January in London) and to have Irish colleagues/businesses shadow them to learn more about the potential market.
- 3. Social media/digital links** – at a very simple level businesses and destinations should be following each other on social media, retweeting, installing website links, inviting guest blogs. This is cheaply and easily done and provides new routes to market.
- 4. PR** – press trips would be a good starting point if you wish to undertake some collaborative consumer promotion eg invite travel writers/journalists on a trip to experience your offer directly. With some creativity you might be able to make this two-centre using the ferry between Dún Laoghaire and Holyhead.

## New Product Development

- 1. Events** – we strongly recommend events as a valuable way to drive visits and to reinforce the destination brand for particular activities. So events are both about product development and marketing. At the moment there is no strategic approach to outdoor events in any of the areas. We recommend you develop an events strategy or strategies for your areas, identifying which events you should be supporting or developing. This could also look at biannual events for certain activities where you share the same activities (coastal watersports are the most obvious example) ie one year in Wales , the next in Ireland.
- 2. Franchising** – we think there may be opportunities to extend beyond learning from each other into franchising. It is worth considering whether the project can support the transfer of successful businesses to other locations through a franchising or similar arrangement. This could provide a fast-track approach to developing the offer.



### A Final Word

The cross- project recommendations can clearly be supported by the Outdoor Tourism Project.

However the area-specific marketing recommendations and the product development recommendations will require people and a budget to make them happen. We don't think these – sometimes substantial – activities can simply be added to the responsibilities of current staff.

We recommend you consider delivery and resourcing for the immediate and longer term to secure legacy and so that expectations won't be raised among businesses only to be let down when the project funding is finished. (This is in part the reason why, wherever possible, we have tied in to other strategic priorities).

Our recommendation would be for Wales and Ireland to each appoint a Project Manager with a product development and marketing remit for outdoor tourism to work on the recommendations we have outlined. This person could be seconded from within the local authority or another organisation, a new appointment, or the function could be outsourced.





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