

# Executive Summary



As visitor expectations continue to rise and competition intensifies, tourism managers globally are seeking to differentiate their destinations in meaningful terms. In response, Fáilte Ireland is committed to transforming Irish leisure tourism by leading its evolution from a product to an experience model based on market insights. An important component in any visitor experience is the quality and authenticity of food offerings. In recognition of this fact, Fáilte Ireland made a strategic decision to embark on a collaborative approach to the development of food tourism in Ireland which led to the introduction of the *National Food Tourism Implementation Framework 2011-2013* (the 'framework'). The overall aim of the framework was to develop Irish food tourism by building on the strength of our food export market, the success of our drinks industry and the powerful blend of Ireland's renowned hospitality, unique culture and green natural environment. The framework has subsequently generated a range of actions aimed at supporting the industry in recent years. Given the fundamental competitive and organisational changes affecting Irish tourism at present, the time is right to review the impact of the framework and plan a way forward.

In preparing a Food Tourism Activity Plan 2014-2016, the overall goals are to:

- Contribute to the achievement of Fáilte Ireland's stated objective to grow visitor numbers, revenue, and tourism-related employment.
- Support the wider priority to develop great Irish tourism experiences.
- Ensure that stakeholders in food tourism are encouraged to take more ownership for initiatives which can help develop food tourism.

As the projected growth in visitor numbers and revenue over the medium term will primarily stem from international markets, this in turn means that Fáilte Ireland must target its activities in food tourism towards those experiences that have greatest appeal to and relevance for overseas visitors. Consequently, the Food Tourism Activity Plan 2014-2016 is based upon a revised intervention model that prioritises actions which maximise reach and impact within the confines of scarce resources. Furthermore, to ensure that the plan effectively responds to the concerns of food tourism operators, it has been prepared with significant input from the members of the Food Tourism Development Network which comprises 22 peer-nominated Irish Food Ambassadors. (See Appendix 1 for details of membership). This Executive Summary describes the following elements of the plan:

Strategic Context	<ul style="list-style-type: none"><li>• National Food Tourism Implementation Framework 2011-13 – Impact Assessment</li><li>• Experiential Tourism Explained</li><li>• The Future Direction for Irish Tourism</li></ul>
Fáilte Ireland Response	<ul style="list-style-type: none"><li>• Enhancing Irish Food Experiences – Priorities and Plans</li></ul>







# National Food Tourism Implementation Framework 2011-2013 – Impact Assessment

Under the National Food Tourism Implementation Framework, the vision for food tourism was defined as being: ***'Ireland will be recognised by visitors for the availability, quality and value of our local and regional food experiences which evokes a unique sense of place, culture and hospitality'***. To realise this vision a strategic map was created, defining five key areas of activity: 1. Stakeholder Partnering and Facilitating, 2. Research and Benchmarking, 3. Brand Development and Promotion, 4. Quality and Standards, and 5. Business Supports.

To better inform decision-making in future, Fáilte Ireland commissioned an important study on visitor perceptions regarding food. This has resulted in a comprehensive series of food-related questions being added to the Holidaymaker Survey since 2012; this data will prove invaluable in the years ahead in planning and developing food tourism. A general comparison of the trends in visitor perceptions regarding their food experiences between 2010 and 2012 shows that the implementation of the national framework has made a difference. Taking hotels and pubs as an example, the numbers of visitors offering the highest satisfaction ranking across quality, price and service dimensions has grown in all cases over the period.

	2010			2012	
	% of respondents signifying the highest satisfaction rating				
	Hotel	Pub	➡	Hotel	Pub
Quality	28%	28%	➡	47%	36%
Price	15%	15%	➡	34%	25%
Service	36%	35%	➡	52%	43%

Source: Fáilte Ireland Holiday Maker Surveys

Some of the tangible outcomes from the framework also include:

Partnering and Facilitating	<ul style="list-style-type: none"> <li>A Food Tourism Development Network was established comprising 22 peer-nominated Food Ambassadors.</li> </ul>
Research and Benchmarking	<ul style="list-style-type: none"> <li>A broad range of applied and academic research has been completed to better inform food tourism developments.</li> </ul>
Brand Development and Promotion	<ul style="list-style-type: none"> <li>Food tourism was integrated into Discover Ireland domestic campaigns; one food specific campaign alone had a reach of 3.5 million.</li> </ul>
Quality and Standards	<ul style="list-style-type: none"> <li>The 'Place on a Plate' initiative encouraged businesses to promote and deliver memorable food experiences and impacted over 300 operators.</li> </ul>
Business Supports	<ul style="list-style-type: none"> <li>An extensive suite of online food-focused business tools has been added to the Fáilte Ireland corporate website.</li> </ul>

The framework, and its impact, has also helped to change mindsets about the importance of food tourism, what it entails, and the need for a collaborative approach to its development. Across a number of metrics from rising consumer satisfaction, to the growth seen in the number of food related experiences, the *National Food Tourism Implementation Framework 2011-2013* has been successful in delivering on the intended outcomes.

# Experiential Tourism Explained

In preparing a Food Activity Plan for 2014-2016 it is useful to briefly explore the experiential tourism concept. A tourism experience is multi-faceted and hard to define, combining elements such as product (the place, its infrastructure, and the specific tourism products on offer), people (locals and the service offered by employees), activities, attractions, in addition to intangible components such as the emotional bond that the visitor potentially forms with the locality. But in all cases, experiences are driven by compelling ideas, themes and stories; they are unique to an area, or made unique to that place through differentiation. In some cases an experience can be a stand-alone entity, but mostly they require the input of a variety of product and service providers. This in turn necessitates collaboration between stakeholders, which is often where the greatest developmental challenges lie.

## Understanding and managing food experiences

To help guide the efforts of food tourism operators, it is useful to have a common understanding of what tangible components must be proactively managed to create and deliver something memorable. In simple terms, managing food experiences requires a focus on three interlinked dimensions including product, stories and service as indicated in the diagram below:



Food tourism operators must focus continuously on these three dimensions to ensure that what they offer to visitors has the potential to create a lasting memory.

This snapshot of what experiential tourism entails and how food experiences should be managed is important as it has informed decisions as to how Fáilte Ireland can best guide food tourism development in the coming years.

# The Future Direction for Irish Tourism 2014-2016



Planning the expansion and enhancement of food experiences cannot happen in isolation and there are a number of substantial developments in Irish tourism which will directly influence what Fáilte Ireland can, and must, do in relation to leading and collaborating with the industry. A number of factors will inform the Food Tourism Activity Plan 2014-2016.

## The Marketing of Ireland at Home and Abroad

As a result of the extensive research undertaken by the Tourism Recovery Taskforce<sup>1</sup>, radical changes are now well underway in the development and marketing of Irish tourism. Such changes will naturally impact on how food experiences are enhanced over time and therefore require serious consideration.

### Overseas Markets

The flowchart on page 8 captures some of the main elements in how Ireland is currently being developed and promoted to compete in international markets. The diagram emphasises how overseas marketing is now more focused than ever and based on revised targeted markets and segments. The model also demonstrates the integrated nature of the overall experience development framework for Ireland and the fact that all developments are ultimately founded upon compelling stories.

### Domestic Market

From a domestic perspective, there are naturally differences in the targeted segments, but the same focused approach applies – and the goal must be to first understand visitor expectations and then develop experiences that respond to those needs.

In essence, the future path for Irish tourism can be characterised as being insight-led, targeted, experience-based, and designed entirely with the needs of the end user in mind.

## Fáilte Ireland Strategy

Fáilte Ireland is focused on supporting the achievement of ambitious targets for 2016, i.e. attracting 7.5 million visitors and growing revenue by 22%. In achieving this, stated corporate priorities include: *Facilitating international sales, Supporting digital best practice, Supporting great Irish tourism experiences and Promoting business excellence*. The organisation must fulfil this programme of work at a time of constrained resources. In relation to food tourism, given that much of the projected growth will come from international markets, this means that Fáilte Ireland must primarily direct its attention to those food offerings that have greatest appeal for overseas visitors.

This overview regarding the marketing of Ireland as a destination and Fáilte Ireland's approach, have helped to inform the next phase in the development of food tourism.

<sup>1</sup> The Tourism Recovery Taskforce (TRT) was a partnership between the tourism industry and state tourism agencies established in 2011 to address current and future challenges to help restore overseas tourism to growth.

## Marketing and Delivering Great Irish Experiences – The Importance of Food Tourism



Further details on the current approach to marketing Ireland are provided in Appendix 2.  
Examples of food preferences by key market segments can be found in Appendix 3

# Enhancing Irish Food Experiences – Priorities and Plans



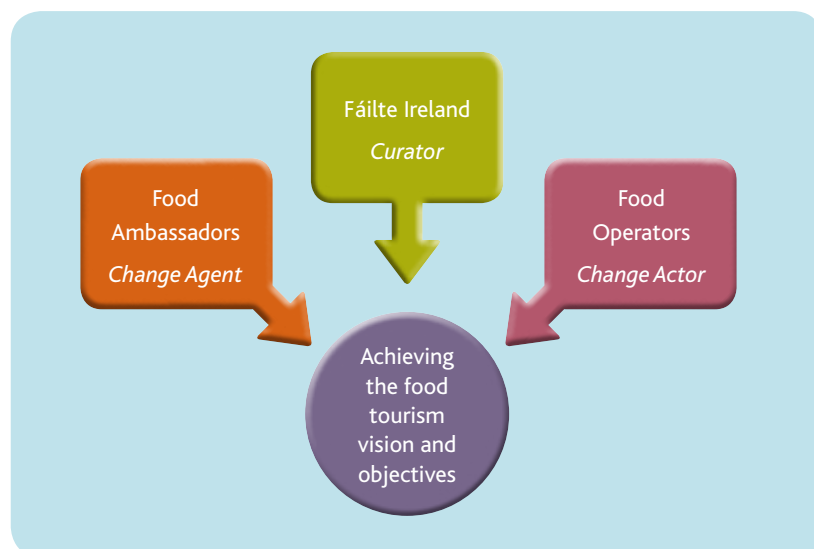
This section outlines the vision for food tourism over the coming period and describes the strategic priorities which will guide its achievement. It defines Fáilte Ireland's key objectives and outlines a new intervention model which is based on specific themes and activities designed to maximise reach and impact.

## Shifting the Emphasis

In the past Fáilte Ireland has largely adopted a directive role in defining and implementing an industry-wide food tourism strategy. Whilst the planning phase happened in partnership with stakeholders, much of the ownership for implementation rested with Fáilte Ireland; this approach was necessary in order to create momentum, promote common objectives, address value for money concerns, and generally, to change thinking on the role of food in tourism. Now that a solid foundation is in place, and given Fáilte Ireland's strategic priorities, this previous level of support is no longer appropriate. In any case, the potential returns gained from enhancing food experiences are now fully evident, and the beneficiaries, i.e. food tourism agencies, operators and local communities, must individually and collectively take greater ownership for future developments. Additionally, The Gathering 2013 proved that well-supported, community-led initiatives can make a real difference when committed and motivated individuals take the lead. It also demonstrated that Fáilte Ireland adds greatest value by:

- Defining the overall vision and strategy based on market insights;
- Empowering stakeholders to do what is necessary to realise the vision and strategy;
- Offering targeted assistance to enable those efforts.

These lessons will be integrated into all food experience developments in the years ahead and, as far as possible, ownership for implementation activities should lie in the hands of non-governmental industry bodies, individual operators and local communities. As a consequence, Fáilte Ireland will increasingly play a collaborative, curator-type role, whereby it sets the overall framework and direction for enhancing food experiences, then guides and enables the efforts of others; be that in working with 'change agents' who can help influence those involved, or with a variety of 'change actors' – at national and local levels – who can make things happen in practice.



Furthermore, over the next three years, whilst there will continue to be aspects of Fáilte Ireland's food tourism activities which are nationally-focused, such as generating and disseminating food-related insights, greater emphasis will now be placed on working collaboratively with stakeholders at a local level to support both the creation of scalable food experiences and those that bring a number of providers together, such as trails and events.

## Food Tourism Vision and Objectives

The refined food tourism vision for 2014-2016 is:

*'Ireland will be recognised by visitors for memorable food experiences which evoke a unique sense of place, culture and hospitality.'*

This provides for a greater emphasis on 'memorable food experiences' which must be the collective ambition in the years ahead. In pursuing this vision, Fáilte Ireland has also defined a number of strategic objectives:

### Fáilte Ireland – Food Tourism Strategic Objectives

- To provide the necessary *thought leadership* for food experience development in Ireland, acting as a *catalyst for change* and empowering others to achieve it.
- To gather and disseminate *market insights and best practices* which will inform all food experience developments in Irish tourism.
- To *engage with national and local stakeholders* to promote the concept of experience development, emphasise the role that food plays within it, and describe how the concept can be practically applied.
- To work with *Food Ambassadors* to continue raising awareness of the great Irish food experiences available and building our food reputation at home and abroad.
- To provide a suite of *direct and online resources* which contribute to the expansion of memorable food experiences throughout Ireland.
- To *future-proof* the industry by continuously identifying existing and potential capability gaps and liaising with education providers on how to bridge them.



These objectives define the areas where Fáilte Ireland has the potential to make best use of available resources and add greatest value to stakeholders, whilst at the same time ensuring that there is alignment of food tourism developments with broader national experiential themes.

In working to deliver on these objectives, Fáilte Ireland has identified a revised intervention model over the next three years, as shown below.

### Food Tourism Intervention Model



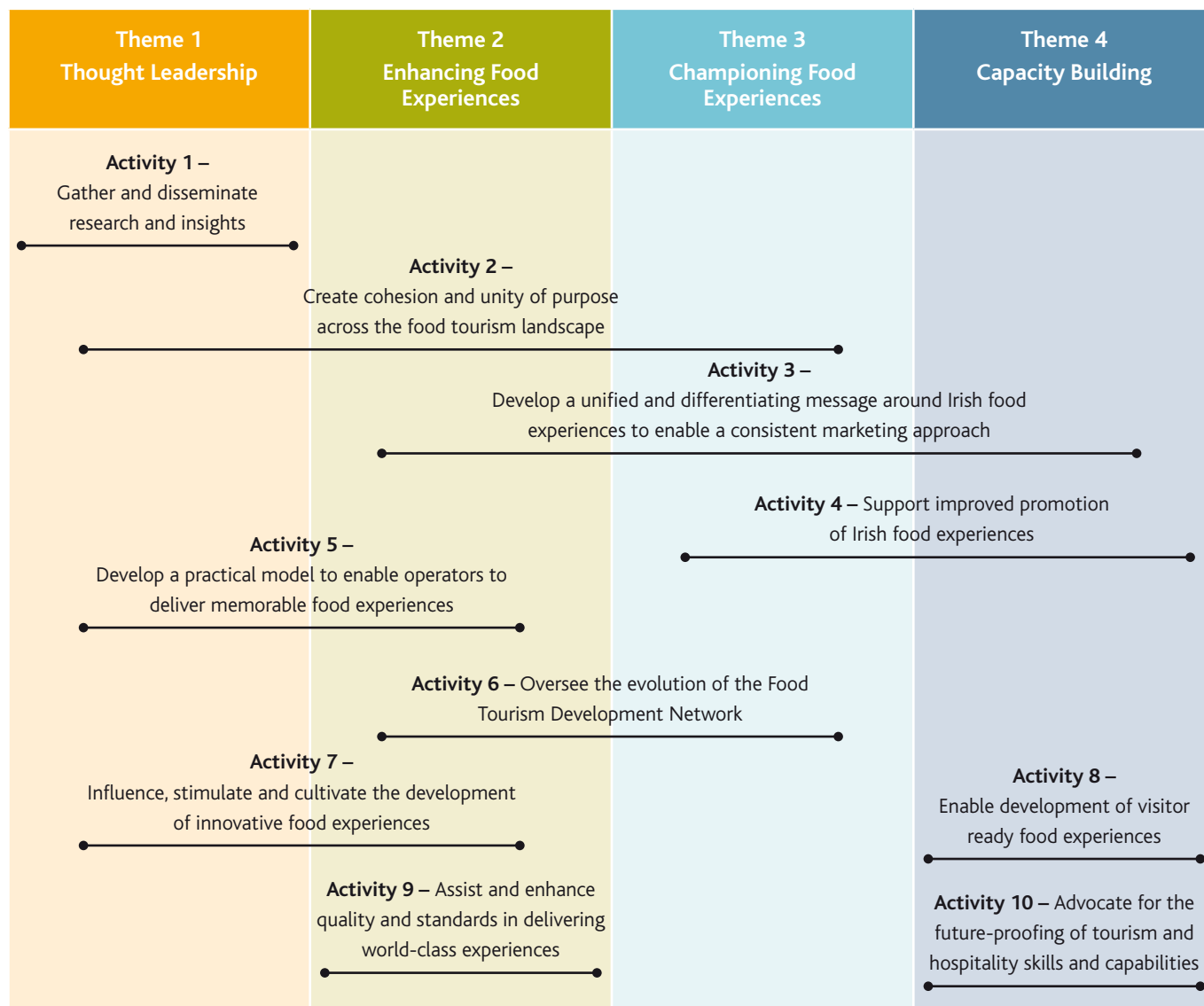
This intervention model will:

- Ensure that decision-making around food experience development is based on market insights and best practice; (*Thought Leadership*)
- Define concrete steps that can be taken to expand and enhance food experiences, in line with the wider tourism development strategy; (*Enhancing Food Experiences*)
- Lead the development of a comprehensive communication programme which will continue to champion Irish food experiences; (*Championing Food Experiences*)
- Offer online resources for operators; and provide for the future-proofing of food tourism by advocating for solutions to identified capability gaps. (*Capacity Building*)

The ultimate aim of this revised approach is to increase the range of memorable Irish food experiences in the coming years and to enhance their reputation; the overall success of that endeavour will be tracked through the trends in results from the Holiday Maker Survey.

# Food Tourism Activity Map 2014-16

The following map summarises the range of food tourism development activities to be led by Fáilte Ireland in the coming years:



## Conclusion

The vision, objectives, themes and activities presented here provide for the preparation of a targeted activity plan which responds to wider concerns such as the marketing of Ireland as a destination, Fáilte Ireland's strategy, and the needs of both consumers and stakeholders. The agreed implementation actions will be led by Fáilte Ireland, but will require substantial input, support and ownership from a range of stakeholders across the food tourism landscape.









# Appendix 1 – Food Tourism Development Network – Members

## *Fáilte Ireland Food Ambassadors*

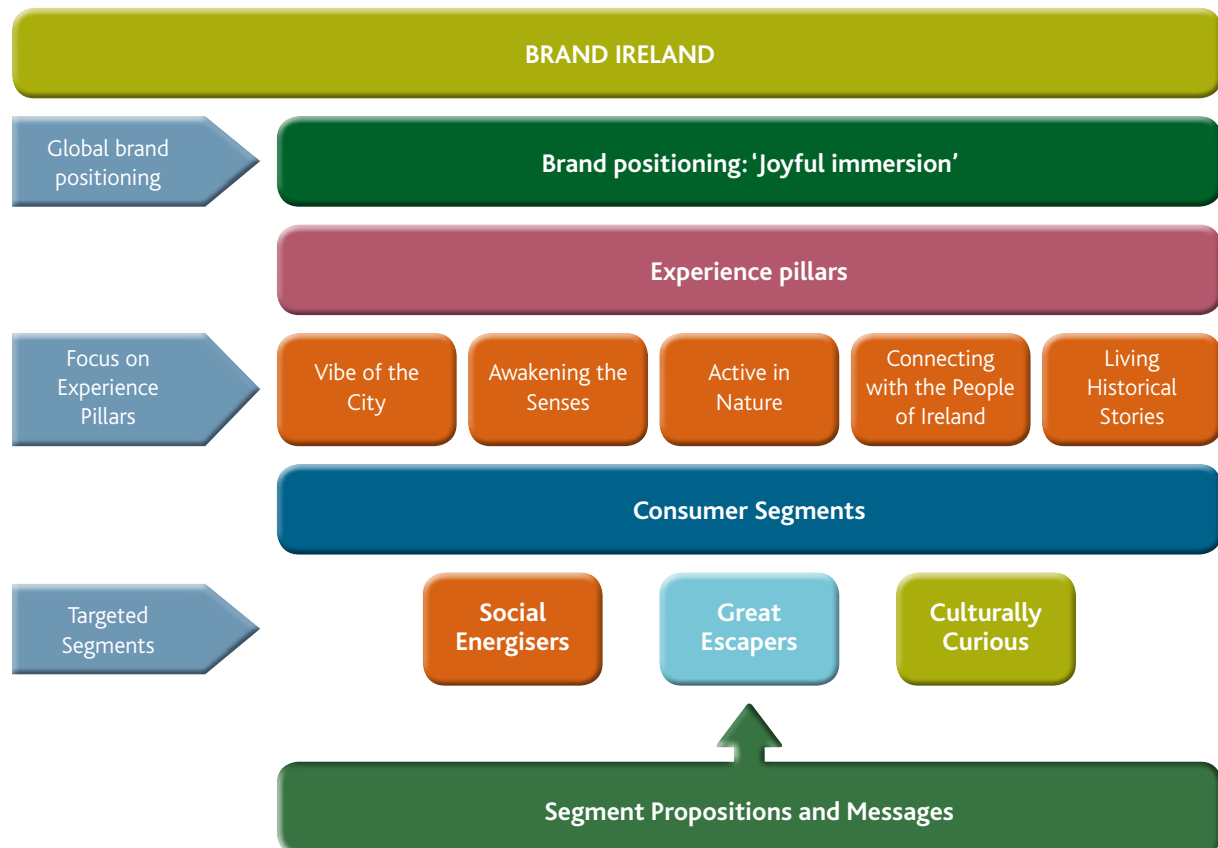
Anthony Creswell	Ummerra Smokehouse
Benoit Lorge	Lorge Chocolatier
Brid Torrades	Café Osta/So Sligo food festival
Colin Jephson	Ardkeen Quality Food Store
Deborah Evers	Clareville House Kitchen Garden
Donal Doherty	Harry's Restaurant
Fergus O'Halloran	The Twelve Hotel
Hugh O'Donnell	Kitty Kellys & Hughies Bar
Jacinta Dalton	Department of Culinary Arts, GMIT
JP McMahon	Aniar Restaurant, EAT Gastropub & Cava Bodega
Mark K Murphy	Dingle Food Festival & Market
Martin Bealin	Global Village Restaurant
Mary McGettigan	Taste of Donegal Food Festival
Olivia Duff	Headfort Arms Hotel
Pádraic Óg Gallagher	Boxty House
Ross Quinn	Vasco Restaurant
Ruth Healy	URRU Artisan Food Store & Cafe
Siobhan NiGhairbhith	St Tola Cheese
Sylvia Meulmeester	Restaurant and Food Promotions
Therese McDermott	HandsOnEvents
Yvonne Carty	Hey Pesto
Zack Gallagher	Irish Food Tours

For further information on the Food Tourism Development Network please go to [www.failteireland.ie/food](http://www.failteireland.ie/food)

## Appendix 2 – Brand Ireland Architecture

### *Brand Ireland Architecture Summarised*

Following extensive research by the Tourism Recovery Taskforce, Ireland is now being marketed overseas in line with an experiential model, and particularly so in the key markets of Great Britain, USA, Germany and France. The Brand Architecture is summarised in the diagram:



### *Experience Pillars*

Research has also shown that certain experience types present the island of Ireland with most potential to appeal to holidaymakers in a credible and engaging manner. These experience pillars include:

- **Vibe of the City** – fresh, exciting and stimulating experiences and attractions in a lively atmosphere
- **Living Historical Stories** – interesting and informative experiences and attractions in urban and rural areas
- **Connecting with the People of Ireland** – immersion in Irish culture.
- **Awakening the Senses** – stimulating and profound experiences within natural and unspoiled landscapes
- **Getting Active in Nature** – revitalising and energising experiences and activities in the spectacular outdoors.

It is these five pillars which have guided the development of the overall experience development strategy for Ireland.



## Targeted Segments

Within the key markets, and based on the attractiveness of the above pillars, three priority segments have also been defined:

	Who are they?	What they want from a holiday?
Social Energisers	<ul style="list-style-type: none"> <li>• Young – 15 to 34 – and like to holiday in groups or as couples.</li> <li>• A good example would be a group of 28-year-olds on a long weekend in Dublin or Belfast.</li> <li>• They're friends or colleagues, looking for a cool, exciting trip somewhere new and vibrant.</li> </ul>	<ul style="list-style-type: none"> <li>• Social Energisers really like having a laugh and sharing the adventure with their friends.</li> <li>• They love new experiences and exploring new places – the more out-of-the-ordinary, the more exciting, the better.</li> <li>• It's great if there is 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.</li> <li>• 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; and old pubs with good food, music sessions and conversation with the locals. Always ready to try new things – exploring the city by day for its vibrancy and unique atmosphere, as well as enjoying the nightlife.</li> <li>• Social Energisers will go for something unusual as long as it has the 'wow' factor they're looking for.</li> </ul>
Culturally Curious	<ul style="list-style-type: none"> <li>• The Culturally Curious are older – most are over 45 and more than a quarter are over 65.</li> <li>• They travel as couples or on their own. If they had children, they have grown up or have left home.</li> <li>• Typical Culturally Curious travellers would be 55 years old, taking a holiday with their partner.</li> <li>• They are out to broaden their minds and expand their experience by exploring new landscapes, history and culture.</li> <li>• They are curious about everything and are delighted to discover the world for themselves once again.</li> </ul>	<ul style="list-style-type: none"> <li>• They're interested in all that a place has to offer and they want it to be authentic.</li> <li>• 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.</li> <li>• The Culturally Curious love to discover the history, the art, the bookshops, the museums. 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.</li> <li>• They 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.</li> <li>• 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.</li> </ul>

	Who are they?	What they want from a holiday?
Great Escapers	<ul style="list-style-type: none"> <li>• Great Escapers tend to be younger, around thirty.</li> <li>• They are often couples, some with babies or quite young children.</li> <li>• Most are in serious need of time out from busy lives and careers.</li> <li>• So they are specifically interested in rural holidays, and travel very much as a couple or family.</li> <li>• Great Escapers are on holiday for a break, to get physical with nature, and to reconnect with their partner.</li> </ul>	<ul style="list-style-type: none"> <li>• 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.</li> <li>• Against this kind of backdrop Great Escapers can spend real quality time with their family, bonding with their partner and children.</li> <li>• They can rebalance themselves and take stock of their lives, concentrating on what's important in life.</li> <li>• They appreciate peace and quiet between activities, even if those activities are themselves low-key: a visit to a castle or landmark, enjoying a relaxed meal at a local restaurant.</li> <li>• 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.</li> <li>• Most importantly, Great Escapers want to come home refreshed and revitalised, their batteries recharged.</li> </ul>

In short, the old model for Irish tourism was needs-based, focusing on what people like to do on holidays whereas the new model is motivation-based, looking at why people take holidays and what they want to feel, both during and after.



## Appendix 3 – Food and the Key Segments



### ***Social Energisers***

This group like casual but good food with lots of choice in new or funky places and preferably, something that they cannot experience at home. They tend to eat and move on to the next activity and are not interested in traditional three-course menus.

Examples of their preferences:

- To be where it is all happening – places with a buzzy atmosphere
- Have a table in the centre of all the action
- Go to the trendiest place in town with entertainment while they eat
- Good food that is local
- Free Wi-Fi so they can share everything they are doing on social media
- A trendy artisan cocktail list, craft beers or innovative whiskey menus
- Brunch options, as they were out late the night before
- Quality, fast and friendly service
- Great barista coffee
- Staff with good knowledge of 'what's happening' and can give them inside scoop on where they should go next.



### *Culturally Curious*

Food is important to this group and they see it as a way to really engage and connect with the local culture and people. They will seek out places to eat that serve local or regional specialities and will expect staff to be able to talk to them about the food.

Examples of their preferences:

- They want to have the best table in the room
- They expect good service and knowledgeable staff
- To know the story and provenance of what they are eating
- A good quality meal with healthy/dietary options
- Classic Irish dining options with a modern twist
- To dine a la carte and are very interested in house specialities
- Peace and quiet with good quality food and wine
- Learn to make scones in their B&B
- Comfortable bar/lounge that is not too noisy but has a nice ambiance
- Chance to chat to the locals, and get tips and recommendations on good places to eat.

### *Great Escapers*

This group is attracted by cosy dining options in cafes, pubs and restaurants or family options for those with young children. As they spend a lot of time outdoors foods that can be used for picnics and self-catering are also very attractive.

Examples of their preferences:

- An authentic Irish experience at a good local hotel, pub or restaurant
- A cosy table for two away from hustle and bustle
- Great value in quality local food
- A good kids menu for those with young children
- A good hearty, high energy breakfast as they will be out and about all day
- An Irish cheeseboard by an open fire
- A local market where they can buy artisan food for a picnic
- Options to order food hampers to be at the self-catering on arrival
- Enjoy an Irish coffee after dinner in a comfortable lounge
- Room service options