



A new strategy for

IRISH ANGLING TOURISM

Make it work for you



Central Fisheries Board
An Priomh-Bhórd Iascaigh



Fáilte Ireland
National Tourism Development Authority



Angling is an important sector for Irish tourism offering sustainable economic potential, especially in rural and coastal areas.

1. Background Context

In the 1970s and 1980s, angling was an essential part of tourist traffic to Ireland, providing valuable business especially to parts of the country that attracted less general holiday traffic. But the 1990s saw the beginning of a decline in visiting overseas anglers, initially a decline in coarse anglers but also, more recently, a decline in other forms of angling. By 2006, Ireland was attracting approximately 103,000 overseas anglers, compared with 173,000 in 1999*.

The decline was driven by a combination of factors, many of which were outside the direct control of the industry (e.g. changing angling trends in the UK, increased competition, foot and mouth disease, 9/11, decline and perceived decline of some fish stocks, reduced water quality, drift netting, fish farming, negative publicity etc.), and some of which were within its control (e.g. inadequate and poorly targeted marketing investment, lack of co-ordination, poor information provision, issues of fragmentation and of capability among elements of the supply side).

However, angling is an important sector for Irish tourism, with the potential to provide for economic growth especially in rural and coastal areas and to provide overseas and indigenous anglers with a deep and enriching experience. Expenditure by overseas anglers in Ireland is estimated at €66m, with an average spend per angler well above that of general visitors.

Following significant consumer research in 2004, which examined the needs and habits of anglers in key overseas markets, Fáilte Ireland and the Central and Regional Fisheries Boards led the development of a new strategy for tourism angling in 2005. The work was carried out by Genesis Strategic Management Consultants and included thorough consultation with service providers, tourism agencies and other relevant bodies.

The project had four objectives:

- *To build awareness and alignment among industry stakeholders on the current position of Irish angling tourism.*
- *To work with stakeholders in developing an integrated marketing strategy for angling tourism.*
- *To clarify priorities for putting the strategy in place.*
- *To build a roadmap for implementing the strategy.*

What is presented here is a summary of the new strategy and more details can be requested from Fáilte Ireland (contact details are provided at the end of this publication).

* see full strategy document for note on statistics



Some Key Messages from the Strategy

The potential for growth appears significant – angling in Ireland is well-regarded and effective in meeting the needs of identifiable tourist segments. There is considerable interest on the part of prospective visitors but they have difficulty in accessing and using the information they require to take the final decision to travel to Ireland.

The experiences of anglers to Ireland appear broadly satisfactory. However, there are some concerns – including concerns regarding the quality of fishing, difficulty in accessing fishing, lack of information, confusion over access and complex licensing requirements, and declining value for money.

The challenges for delivering on the potential are significant – the supply side of angling in Ireland is fragmented and variable in quality. When it's good it's great, but when it's bad...

In providing a high quality Irish experience for visiting anglers, there has to be an holistic focus which is broader than just the angling and includes all elements of the holiday – 'travel, stay, fish, play'.

The Vision for Success for Angling Tourism by 2009

Improved quality and quantity of fishing in the country, with much improved stock levels.

Ireland, and fishing locations within Ireland, are easy to access for visitors, with readily available information.

The supply side of angling tourism is operating effectively and commercially, exceeding customer expectations and developing and leveraging synergies across sectors.

The relevant agencies are working in a co-ordinated manner to target and develop these segments of the market whose needs are most aligned with Ireland's angling offer.

Sustainable growth (economically and environmentally) in tourism angling yield has been achieved (4.5% per annum).

Ireland is established and recognised as a premium destination for angling tourists across all disciplines.

Broad awareness exists, inside and outside the industry, of the potential of angling tourism to Ireland, and there is an appreciation of the breadth and quality of experiences that we have to offer.

The fishing environment is supportive of visiting anglers, with issues such as drift netting and the location of fish farms resolved.

Priorities for Delivering the Strategy

1. Define the standards for which elements of angling tourism will be promoted.

2. Effectively market the best of what we have to the most appropriate anglers.

3. Work with the industry to develop improved economic viability.

4. Make it easier for visitors to come to Ireland to fish.

5. Clarify the roles of the Agencies.

2. Define the standards for which elements of angling tourism will be promoted.

What does this mean?

It means setting and publishing standards for those providing products and services to anglers – standards which are clearly based on customer (not supplier) expectations and needs. The identification of 'centres of excellence', where anglers can experience the best of fishing, accommodation, food and support services/activities, will start the process of setting standards for providing high quality angling experiences in Ireland.

Why?

The quality of what Ireland has to offer anglers varies considerably, leading to uncertainty among potential customers about whether Ireland can really provide what they want. Promoting Ireland as a top-quality angling destination in a competitive market also means we need to focus on providing high quality offers.

What this means for...

<i>Agencies</i>	<i>Product/Service Providers</i>
Lead and set standards, in consultation with the industry, (Note: what is appropriate for one segment may not be for another), which are clearly based on identifiable consumer needs.	Delivery of high quality products and services in line with agreed standards.



3. Effectively market the best of what we have to the most appropriate anglers.

What does this mean?

This means we should focus our marketing efforts only on those segments of the market that are significant in size, where demand exists for Ireland's offer, and where existing supply can meet expectations. In other words, it means matching the best of what we have with clearly identified segments of anglers who are looking for those experiences.

It also means marketing in ways that appeal to the expectations and emotions of the target segments - being aware of the broad needs of anglers when designing marketing communications, rather than simply pushing what we have available.

A description of the priorities for marketing and development is provided overleaf.

Why?

Competitor destinations are becoming increasingly sophisticated while current marketing of Irish angling tends to under-value our strengths and over-state the weaknesses. In attempting to promote all of what we have, we are failing to make the most of our best offers and we are spreading limited resources too thinly.

What this means for...

<i>Agencies</i>	<i>Product/Service Providers</i>
<ul style="list-style-type: none"> Focus marketing resources only on those markets and segments which offer best opportunities (see below). Other segments and markets are selected for further development and for operator-led initiatives. De-emphasise segments where either there is insufficient demand or where Ireland's offer doesn't meet anglers' needs. Ensure marketing communications focus on the total angling holiday experience (not just the fishing), are more specific about location and clearly target particular customer segments. 	<ul style="list-style-type: none"> Re-assess the offer and marketing activities in line with best opportunities for growth. Focus marketing activities on customer needs (not only the fishing), to include the wider holiday elements (accommodation, food, activities, travel, etc.) and to emphasise value for money.

Anglers' Needs

While fishing is a key motivator for the majority of anglers visiting Ireland, it is clear that other factors also influence the final choice of destination and the overall experience of an angling holiday. These other factors are a mix of practical preferences (type of accommodation, travel arrangements, etc.) and less concrete needs (self-fulfilment, challenge, relaxation, etc.). The consumer research carried out by TNS/mrbi in advance of the Strategy identified six 'needstate' segments, which describe customers around preferences for type of holiday, party composition, destination, type of fishing and other more emotive characteristics (e.g. sociability, escapism, etc.). The findings of this research has been incorporated into the Strategy and is presented in summary in the following table, which gives an outline of our key priorities for marketing and development.

Priorities Identified for Marketing and Development

As a result of examining the relevance and potential of the various angling segments, a list of priority segments was agreed and these fall broadly into three groups.

1. Opportunities for broad-based marketing investment – segments where a customer-focused approach can deliver significant growth
2. Opportunities for operator-led initiatives –niche or difficult-to-impact markets where a targeted approach with a specialist who is successful in the area might be a better solution than a broad-based investment: 'backing winners'
3. De-emphasise – segments where the potential either does not exist or Ireland's offer does not answer the need.

The following tables are a synopsis of the various segments which are covered in greater detail in the full strategy document.

Segment	Markets
<i>Priorities for Broad-Based Marketing</i>	
Expert Anglers Individuals or small groups of friends who research fishing opportunities, are highly knowledgeable about destinations, and visit or re-visit places they know offer excellent fishing opportunities. They are highly expert in their approach; and fishing is the only reason for the trip. In terms of accommodation, the focus is on convenience and functionality.	High to medium potential from UK mainly; also Germany, France and Ireland.
Groups of anglers, traveling by car, on one week trips or long weekends, here for fishing and craic (multiple locations, with low/mid-range accommodation and pubs nearby).	UK mainly; also Germany, Netherlands, Ireland and N.Ireland.
Sea anglers travelling with friends, perhaps organised through clubs, where the focus is on catching big fish. The focus is on anticipation of how big the fish will be rather than the effort/techniques. They need excellent skippers and usually an all-in deal with hotel accommodation.	Medium to low potential from UK, Netherlands, France, Ireland and N. Ireland.

Segment	Markets
<i>Priorities for Broad-Based Marketing (Cont.)</i>	
Sea anglers travelling independently where the emphasis is on relaxation – small boat and shore fishing with B&B/self-catering for long weekend or week.	High to medium potential from UK and Ireland; also N.Ireland.
Tourists visiting Ireland for a general holiday but are game anglers and could be enticed into including angling as part of the trip – 'fish in the land of my forefathers'; romantic view of Ireland; high quality accommodation; excellent fly and game fishing locations; couple/family friendly locations.	Medium to low potential from USA.
<i>Priorities for Operator-Led Initiatives</i>	
Sea anglers travelling with friends where the focus is on catching big fish. The focus is on anticipation of how big the fish will be rather than the effort/techniques. They need excellent skippers and usually an all-in deal with hotel accommodation. Large market but many will find Ireland unsuitable – 'deep freeze anglers'.	Medium to low potential from Germany.
Sea anglers travelling independently where the emphasis is on relaxation – coastal and boat fishing with B&B/self-catering.	Medium to high potential from Germany.
'Serious contenders' – experts - individuals or small groups looking for something really special. High quality accommodation; packaged tours. Large market but difficult to impact – strong local competition.	Low potential from USA.



4. Work with the industry to develop improved economic viability.

What does this mean?

It means working with the industry to develop the quality of what is being offered and to improve the co-ordination of efforts. It also means playing an active advocacy role in addressing issues which are impediments to success – the consultation phase of the Strategy highlighted a number of structural issues which impact angling, including drift netting*, draft-netting, long-lining, tangle nets, inshore trawling, predator management, illegal fishing and water/habitat quality.

Why?

Building the quality of what Ireland offers and improving co-ordination are prerequisites for growth. There are concerns currently about quality, and efforts (both marketing and development) are fragmented.

What this means for...

Agencies	Product/Service Providers
<p>Key areas of priority for developing the supply-side include:</p> <ul style="list-style-type: none">• focusing on strengths;• building capabilities;• developing infrastructure and quality of fishing;• facilitating improved communication/co-operation across all relevant sectors (accommodation, angling, activities, transport, etc.).	<p>A willingness to embrace change – greater co-operation with non-angling suppliers, increasing capabilities, improving quality, etc.</p>

*Although the recent Government decision to implement the recommendations of the report by the Independent Salmon Group (and the implementation of scientific advice of the Standing Scientific Committee of the National Salmon Commission for 2007) means an end to the indiscriminate mixed stock wild salmon fishery in Ireland from 2007, other issues still remain.

5. Make it easier for visitors to come to Ireland to fish.

What does this mean?

This means ensuring that customers have easy access to relevant and directive information which enables them to research, plan, book and enjoy their angling holiday, and have an excellent experience while they are here.

Why?

We need to make sure that visiting anglers are directed to where their expectations will be best met. Some of the current information provision is difficult to navigate and reflects the structure of the industry rather than the requirements of anglers. This is particularly important given the dominance of independent, rather than package, travel. It is also particularly important in attracting new anglers to the country, as they need more information than repeat visitors who may be more familiar with angling in Ireland.

What this means for...

Agencies	Product/Service Providers
Streamlining of information and data sources to present relevant information for anglers – with a focus on quality of presentation, breadth and depth of information, and timeliness. Information needs to be provided online, in print and at location. There is also a need to enable visitors to make arrangements online, including securing the necessary licences.	Co-operating with national efforts to co-ordinate information provision and ensuring information is provided as necessary. This will be led and co-ordinated by Fáilte Ireland and the Central Fisheries Board.



6. Clarify the Roles of the Agencies

What does this mean?

This means ensuring that the respective accountabilities of the agencies in relation to angling tourism are established and clear. It also means the establishment of a platform for how the agencies will work together to deliver on the vision and goals of the strategy – a central co-ordination group for angling tourism.

Why?

Ultimately, this clarity and co-ordination is important in making it easier for people to go fishing. It also maximises limited resources (people, funding, etc.) and delivers value for money. It also ensures that industry is clear about the responsibilities of agencies and about what support and services are available.

What this means for...

Agencies

Establishment of an inter-agency team to lead the implementation of the strategy, including Fáilte Ireland, the Central and Regional Fisheries Boards, Tourism Ireland and the Marine Institute.

7. Next steps

A detailed action plan is underway based on the priorities above and the recommendations of the Strategy. While Fáilte Ireland and the Central Fisheries Board are leading the implementation of the Strategy, the ability to deliver the various elements of it is a shared accountability between various agencies (including Fisheries Boards, Local Authorities, angling clubs, local tourism bodies, etc.) and industry in its broadest sense (not only angling-specific operators, but also accommodation providers, pubs, restaurants, other activity operators, etc.). The challenge lies in the co-ordination of these various parties to deliver on the vision outlined at the beginning of this brochure. Apart from the establishment of the inter-agency team, another element which may assist in improved co-ordination is a proposed users' council to be set up under the direction of Fáilte Ireland.

The delivery of the Angling Tourism Marketing Strategy is also dependent on adequate resources being provided so that the goals and objectives can be translated into meaningful actions which will deliver the identified increase in visitor numbers over the period 2007-2009. There is currently in the region of €650,000 being expended annually on the marketing and promotion of angling by Fáilte Ireland in partnership with Tourism Ireland and the Central and Regional Fisheries Boards. However, it is recognised and accepted by all that additional resources will be required if we are to fully deliver on this Strategy.

To this end, a total of €3m in incremental funding for the marketing of Angling Tourism over the period of the Strategy has been requested. Fáilte Ireland and the Central and Regional Fisheries Boards will be working with the Department of Arts, Sports & Tourism and the Department of Communications, Marine & Natural Resources and will jointly develop a detailed and targeted set of actions consistent with the Strategy that provide best value for money for the agreed expenditure.

Measuring the delivery of the new Strategy will require the construction of a form of 'scorecard', with Key Performance Indicators falling into three broad categories. These are indicators associated with:

- volume and yield, e.g. visitor numbers and expenditure by market, etc.;
- execution, e.g. how well particular initiatives have been completed, etc.;
- and satisfaction, e.g. industry feedback.

In addition, it is accepted that detailed accurate and timely statistics on tourism angling are required in order to assist in the delivery and measurement of the strategy. To this end, a joint Fáilte Ireland and Central Fisheries Board research project is being commissioned to look at the current data available, to advise on new collection methods and synthesis of research from various fisheries and tourism sources in order to accurately capture and track trends in angling tourism into the future.

Relevant contacts

Fáilte Ireland

Information regarding Fáilte Ireland's activities is provided on the website: www.failteireland.ie.

This includes information on:

- the marketing of angling as a niche product area;
- support for regional marketing;
- product development;
- education and training (e.g. Management Development Programme, Learning Networks, Marketing Skills, etc.)
- copies of useful publications (e.g. Angling Fact Card)

Useful contacts within the agency include:

National Contacts

Angling Product Marketing Officer – Orla Woods, Tel: 01-8847131, email: orla.woods@failteireland.ie

Product Marketing Manager – Mark Rowlette, Tel: 01-8847132, email: mark.rowlette@failteireland.ie

Regional Contacts

Fáilte Ireland South East: Tel: 051-875823 Fáilte Ireland South West: Tel: 021-4255100

Fáilte Ireland Midlands East: Tel: 044-9348761 Shannon Development: Tel: 061-361555

Fáilte Ireland North West: Tel: 071-9161201 Dublin Tourism: Tel: 01-6057700

Fáilte Ireland West: Tel: 091-537700



Central Fisheries Board

The principal functions of the CFB are to advise on policy relating to the conservation, protection, management, development and improvement of inland fisheries and sea angling; and to support, coordinate and provide specialist support services to the Regional Fisheries Boards. Information regarding these and the Board's other activities is provided on the website: www.cfb.ie. This includes:

- The Irish Angling Update – a regular update on how fishing is around the country.
- Information on fishing resources, e.g. ghillies, tackle shops, charter boats, regulations, etc.
- Research and publications.

Additional information relating to the CFB can be found on its website: www.cfb.ie

Useful contacts within the agency include:

Director of Promotion and Marketing – David Byrne, Tel: 01 884 2656, email: david.byrne@cfb.ie
Angling Information Officer – Paul Bourke, Tel: 01 884 2674, email: paul.bourke@cfb.ie

Angling Advisors:

Norman Dunlop, Tel: 01 884 2673, email: norman.dunlop@cfb.ie
Mark Corps, Tel: 01 884 2672, email: mark.corps@cfb.ie
Shane O'Reilly, Tel: 01 884 2621, email: shane.oreilly@cfb.ie

Regional Fisheries Boards

There are seven Regional Fisheries Boards. These statutory bodies are responsible for managing, protecting, conserving and promoting the fisheries resource in their region.

The Eastern Regional Fisheries Board:	Tel: 01-2787022	www.fishingireland.net , email: info@erfb.ie
The Southern Regional Fisheries Board:	Tel: 052-23624	www.srfb.ie , email: enquiries@srfb.ie
The South Western Regional Fisheries Board:	Tel: 026-41221	www.swrfb.com , email: swrfb@swrfb.ie
The Shannon Regional Fisheries Board:	Tel: 061-300238	www.shannon-fishery-board.ie , email: info@shannon-fishery-board.ie
The Western Regional Fisheries Board:	Tel: 091-563118	www.wrfb.ie , email: info@wrfb.ie
The North Western Regional Fisheries Board:	Tel: 096-22623	www.northwestfisheries.ie , email: info@northwestfisheries.com
The Northern Regional Fisheries Board:	Tel: 071-9851435	www.nrfb.ie , email: info@nrfb.ie



We need to make sure that visiting anglers are directed to where their expectations will be best met.

Amiens Street

Dublin 1

Ireland

Phone +353 1 884 7700

Email info@failteireland.ie

Corporate Website:

www.failteireland.ie

Consumer Website:

www.discoverireland.ie



Fáilte Ireland

National Tourism Development Authority

