



» Walking

MARKET
RESEARCH 2013

» Current Market Performance

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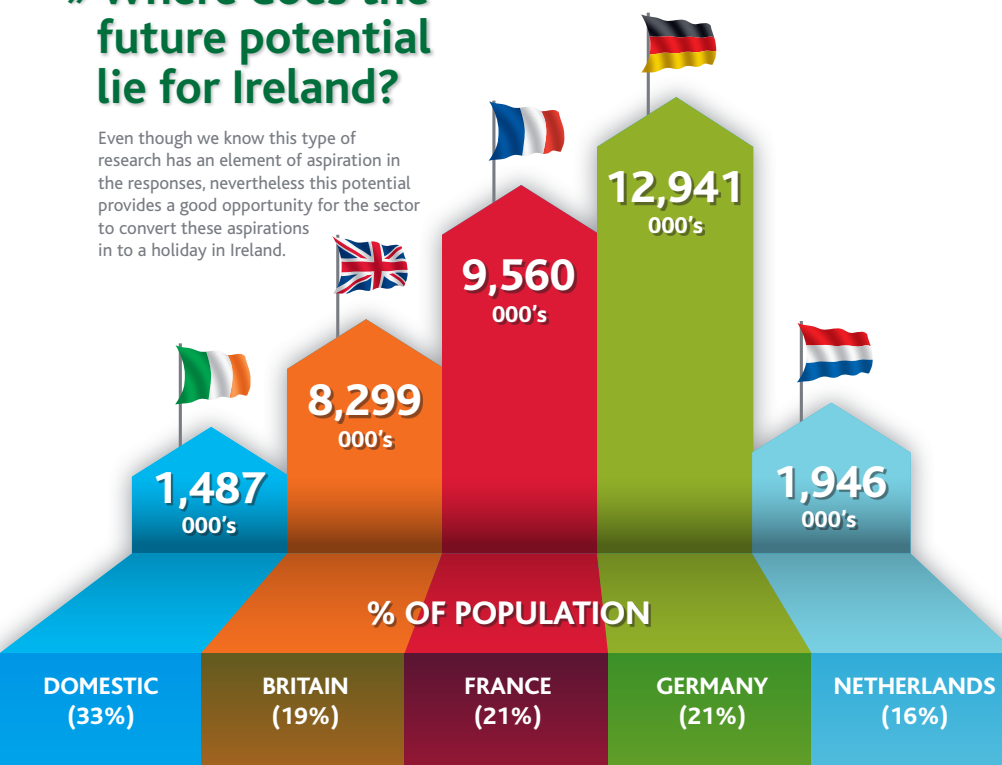
- Britain (31%)
- Mainland Europe (44% - of which France 11%; Germany 10%);
- North America (18%)
- Other long haul (6%)

Around a third of these visitors stated that walking was an important factor in their choice of Ireland as a holiday destination (225,000). Of this 740,000 visitors, 78% used walks which start and finish at the same location (in a loop), 79% walked for <10km and only 10% were accompanied by guides.



» Where does the future potential lie for Ireland?

Even though we know this type of research has an element of aspiration in the responses, nevertheless this potential provides a good opportunity for the sector to convert these aspirations in to a holiday in Ireland.



» Future Market Potential

In market research commissioned by Fáilte Ireland in 2013, nearly 15,000 interviews were conducted across the Irish and four key overseas markets of Britain, France, Germany and the Netherlands.

The following sets out the 'core' market potential opportunities and challenges for the walking offer in Ireland.

- Walking offers the highest potential of any activity for Ireland for both domestic and overseas markets.
- Germany, Britain and France each offer a 'core' market potential of more than 8 million people, and the domestic market has an 'core' potential of 1.5 million people or 33% of the population.
- In both overseas and domestic markets interest in walking is much more definite than for other activities and intentions are somewhat firmer, making them somewhat easier markets to convert.

» Who are our competitors?

- One of the biggest challenges for Ireland will be to get people to travel outside their own country to for these activities.
- BRITAIN: England (86%), Scotland (79%) and Wales (78%) provide the greatest competition for walking holidays, 71% would consider an Irish walking holiday.
- FRANCE: France (89%), Spain (69%) and Italy (66%) are the main destinations for walking, and 54% would consider Ireland for a walking holiday.
- GERMANY: Germany (90%), Spain (71%) and Italy (69%) provide the greatest competition, with 63% of the core potential market considering Ireland for a walking holiday in the next three years
- IRELAND: about half (46%) of respondents who have taken a holiday or break overseas in the last two years have engaged in walking during that holiday
- These holidays are taken most frequently at home (80%), or in England (24%) and Spain (20%). Possibly reflecting where Irish people generally tend to go on holidays

¹ Core Market Potential: those that have participated in this activity whilst on holiday abroad in the last 2 yrs, and would consider participating in this activity on holiday in Ireland in the next 3 yrs.

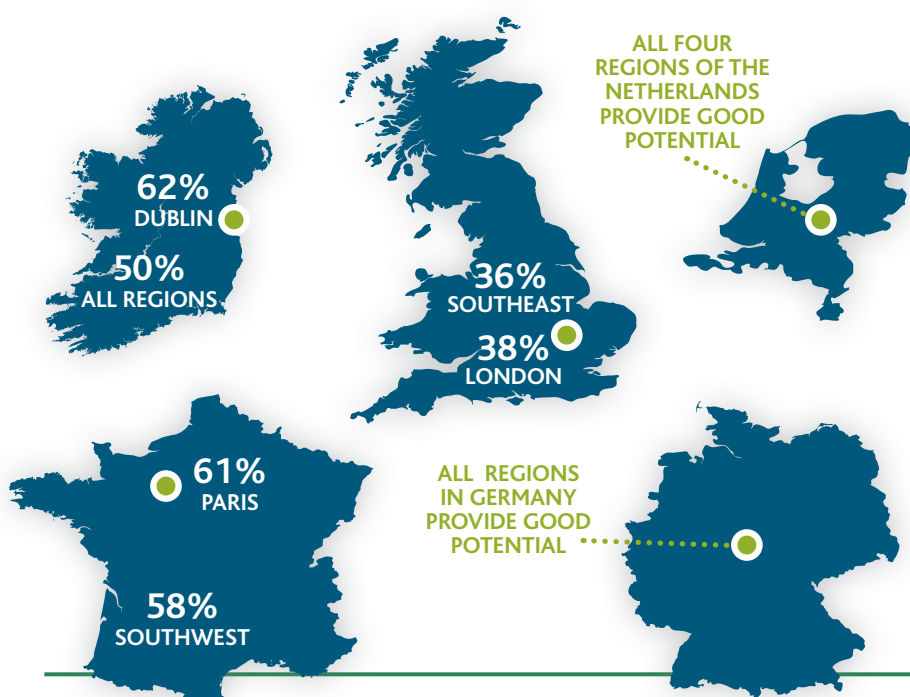
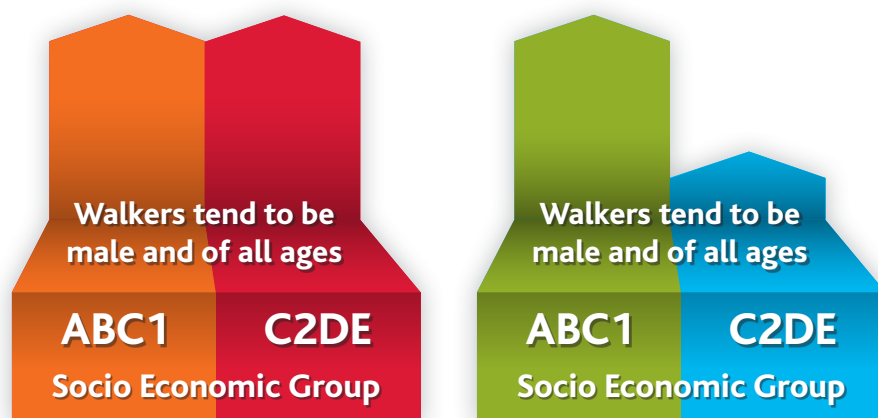
» Market Profile - Who are these people?



IRISH MARKET



OVERSEAS MARKET



» Key Points on Walking in Ireland

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

» What are people's perceptions of walking in Ireland?

OVERSEAS

- Walking in Ireland was well rated by those who were aware of what we had to offer as all attributes attract high proportions of 'excellent' or 'good'
- However, awareness of some of the practicalities such as availability of information, ease of booking and availability of trained guides is somewhat lacking.
- Linkages between various activities are also important as part of the overall holiday experience and walking is an activity that is often done in conjunction with cycling.

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Ireland is already an attractive destination for walkers

65 - 74 year old German female

DOMESTIC

- Irish respondents have stronger opinions about the Irish activities offering than overseas respondents, although walking fares reasonably well, particularly in terms of quality on offer and range of choice.
- The biggest weaknesses were seen to be around the availability of information and availability of trained guides.

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More availability on the location of walking routes which are totally accessible to the public (i.e. free from landowner issues)

65 - 74 year old Irish male