



Carlow National Tourism Conference

Ethna Murphy
Tracey Coughlan



Collecting Turf from the Bog, Connemara, Co. Galway, Ireland.



Kissing the Blarney Stone, Blarney Castle, Co. Cork, Ireland.

Photo: from Wallis, John Hinde Studios.



The two dominant drivers of tourism in Europe are Mediterranean Beaches and Alpine Ski Slopes.

Despite having neither of these facilities, Irish Tourism has performed strongly in European terms.

The Landscape and Seascapes of the Ireland



What we are going to cover

- Adventure 2014 – Some Facts
- Shift from Product to Experiences
- Building Ireland's Adventure Story
- Adventure Trade World Summit (ATWS), Killarney, October 2014

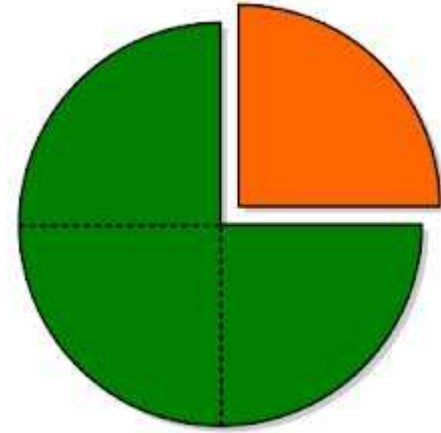
10 facts about the Adventure Tourism Market



1

Adventure Tourism is big business

- One quarter (26%) of global travel is Adventure Tourism and it is growing!
- ATTA measures 17% annual sector growth



Adventure has high value potential to Ireland

- Overseas sector worth over €1 billion to Ireland in 2012
- Activity travellers spend 45% more than other visitors on their trip.



Ireland targeting 5 of top 6 spenders

2011 Data

	Expenditure (USD billions)	Populations (Millions)	Expenditure per Capita (USD)	Market Share (%)
Germany	84.3	82	1,031	8.2
USA	79.1	312	254	7.7
China	72.6	1,348	54	7.0
UK	50.6	63	807	4.9
France	41.7	63	660	4.0
Canada	33.0	34	958	3.2
Russia	32.5	142	228	3.2
Italy	28.7	61	473	2.8
Japan	27.2	128	213	2.6
Australia	26.9	23	1,184	2.6
World	1,030.0	6,946	148	100.0

90% of Adventure is “soft”

Traditionally adventure is viewed as high octane hard core activities for thrill seekers.



In reality 90% of adventure travel is '**soft**' and it includes walking, cycling, fishing, bird watching, archaeology and meeting the locals.



5

Ireland is mostly soft adventure



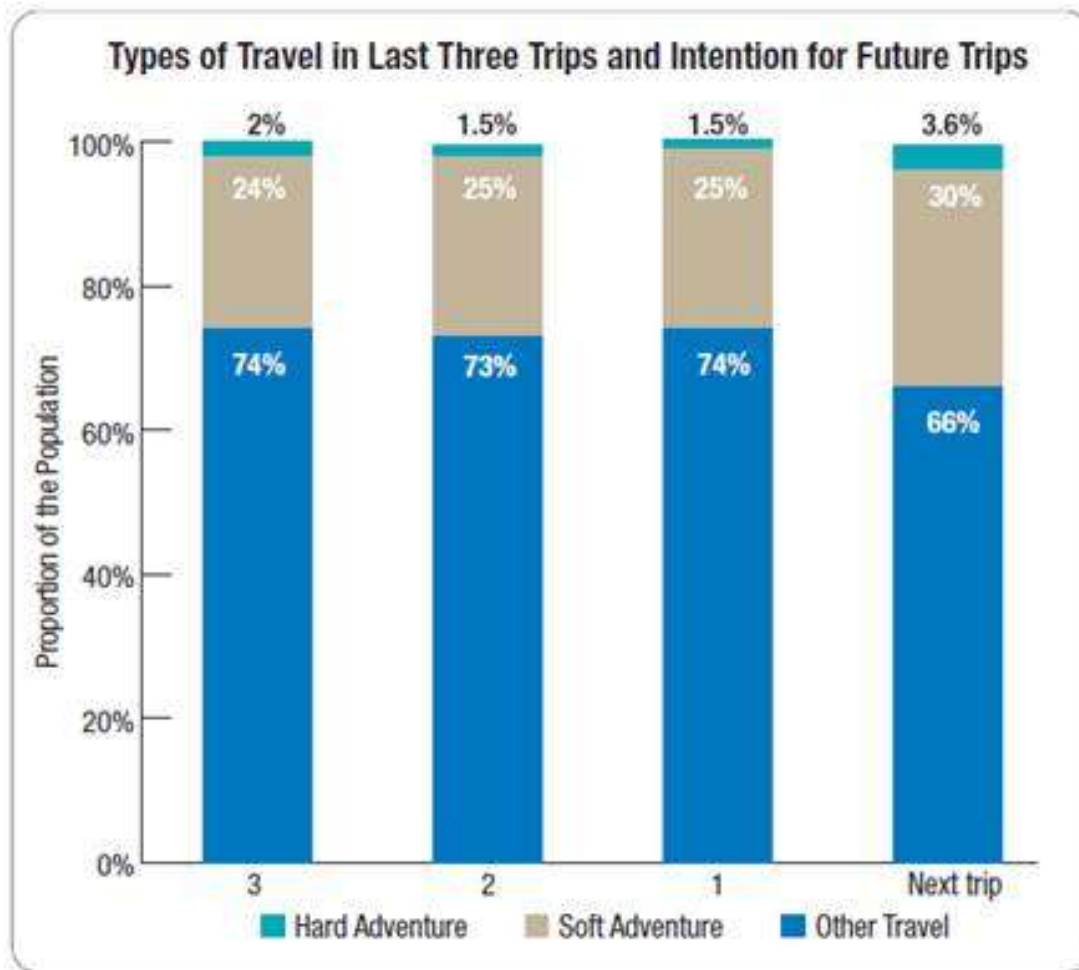
- 90% of Irish adventure is 'soft adventure'
- This covers a broad range of activities including walking, cycling, fishing, water sports, archeology and bird watching.

Walking is currently a key driver for Ireland

- Key activities in Ireland are walking & hiking with 33% citing walking as a key choice factor for Ireland



People “think” hard adventure and “do” soft



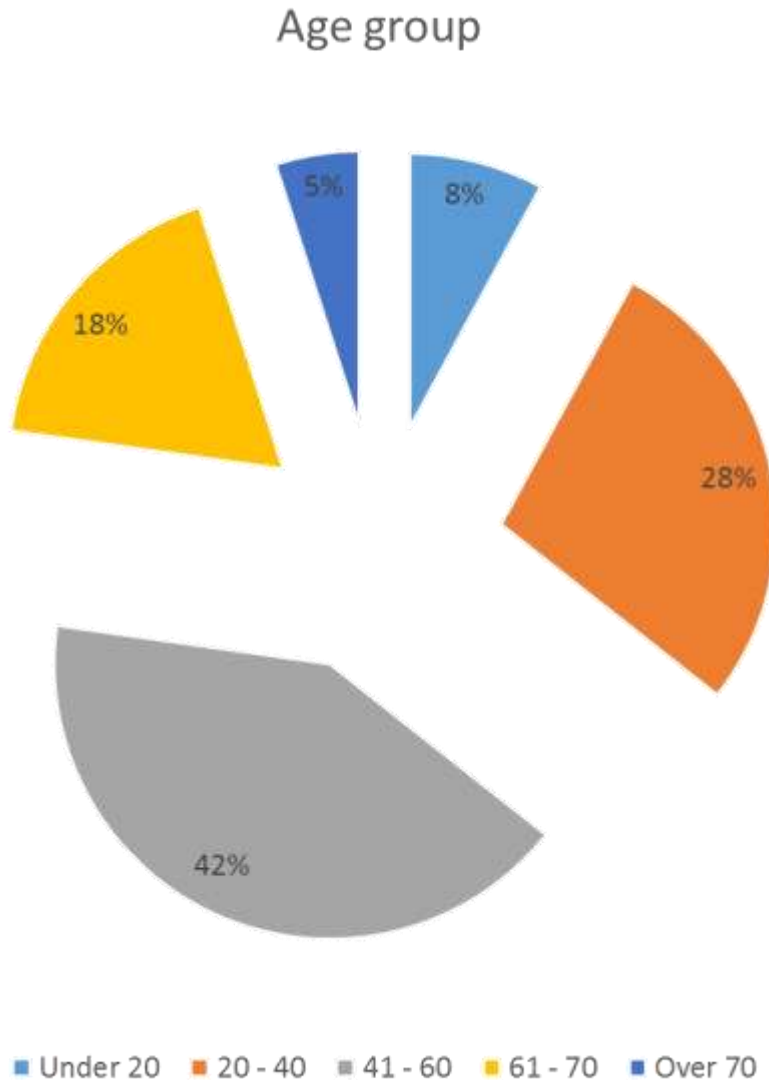
Intentions are 8:1 soft
to hard adventure
Experience is 16:1

Ireland is about adventure activities – not adventure holidays

- Travellers selecting adventure trips want more than the activity
- Ideal adventure “trip” includes
 - interaction with nature,
 - interaction with culture,
 - outdoor activity
- Intersection of all 3 is a full service adventure holiday experience



Adventure customers are “not young men”!



42% are aged between 41 and 60

51% are women



**78%**

The Peer 2 Peer Movement is manifesting itself across different industries. Adventure tourism is one of those industries. Tourists are not asking the travel agents for information, they are going online, onto blogs and social networks.

New Strategy



Convert Great Irish Products into Compelling Experiences



get out there!
Ireland's West Coast



FAMILY[®]
FRIENDLY.

2009



Experiences



Share and Tell Our Stories !



THE EXPERIENCE WHEEL – COMPONENTS OF A MEMORABLE TOURISM EXPERIENCE

The Experience Wheel captures the components that combine to deliver a memorable experience.





The most successful places stake a claim that cuts through the 'noise' of the competitive environment.

They do this by agreeing and telling a "shared story" ... a story that goes much further than simply marketing communications, and is at the heart of destination development

Building Ireland's Adventure Story



Adventure Tourism Ireland

Ireland's Competitive Set for adventure tourism

- Our key competition is our neighbours
 - England, Scotland, Wales
 - Also Iceland
-
- The challenge is to get travellers to make the trip to Ireland



Long haul destinations must sell the “complete adventure” package.

- Countries such as Australia, New Zealand and Canada are competing in a different space to Ireland.
- They are selling a “once in a lifetime” proposition.

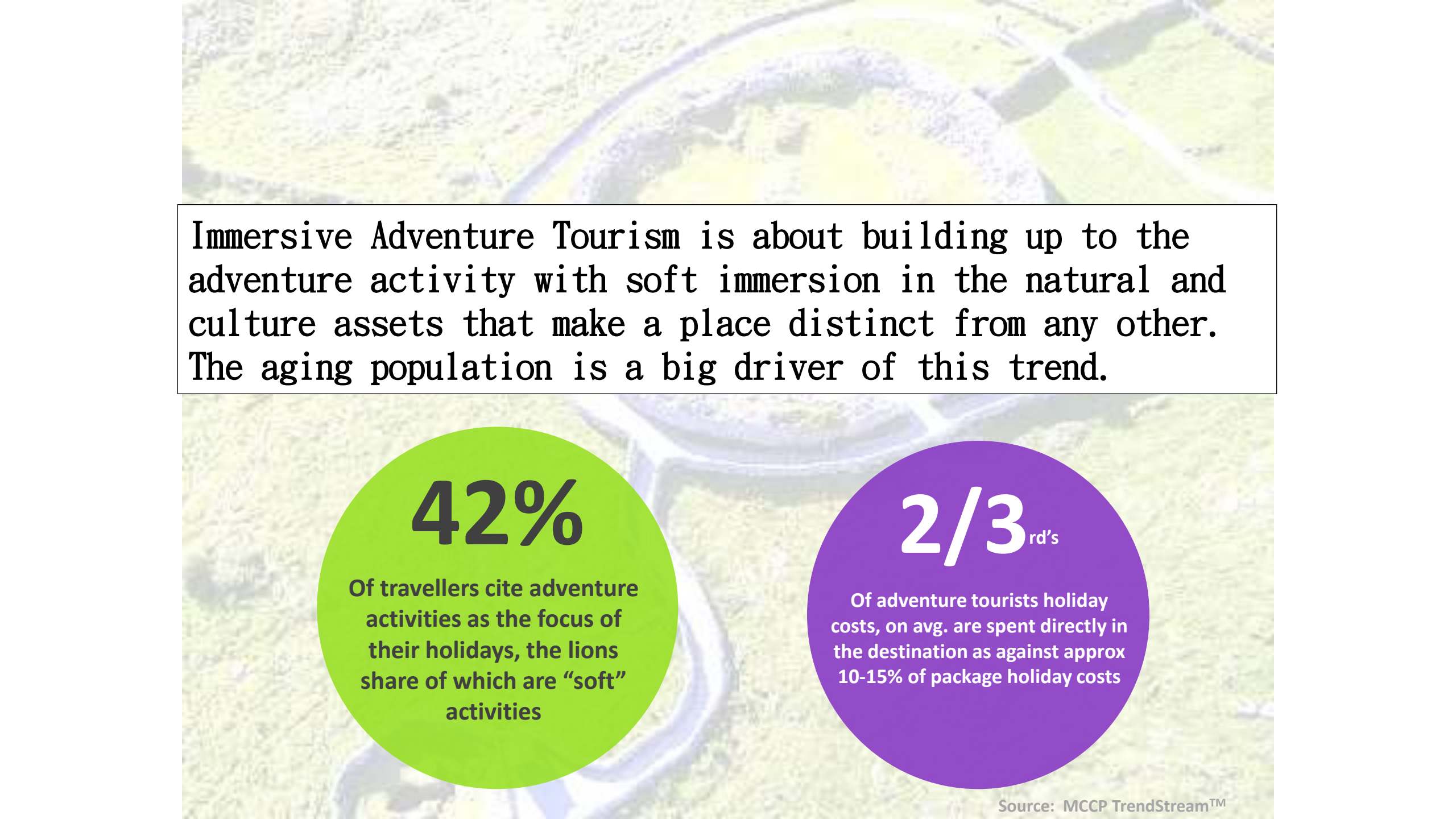


Global Consumer Holiday Trends





1. Immersive Adventure Tourism



Immersive Adventure Tourism is about building up to the adventure activity with soft immersion in the natural and culture assets that make a place distinct from any other. The aging population is a big driver of this trend.

42%

Of travellers cite adventure activities as the focus of their holidays, the lions share of which are “soft” activities

2/3rds

Of adventure tourists holiday costs, on avg. are spent directly in the destination as against approx 10-15% of package holiday costs



2. Environmental Adventurists




1 of the top 3 concerns

Of adventure tourists is not impacting negatively on the local environment

Adventure seekers want to know that what they are doing will impact positively on the place in which they're going. A big driver of this trend is the growth of urbanisation.



3. Take Home Adventurer



The tourists go for the adventure but what becomes more important is that they leave with a learning. It is also really important that the experiences people go home with are easily transferable online e.g. images and videos. These trips will become catalysts of change for the tourist.



73%

**Of Adventure travellers
plan to participate in
adventure activity on
their next trip**

22%

**Of Adventure travellers
plan on doing the same
activity as their last trip**



4. Off the Track Adventurers

This tourist seeks smaller groups of service providers and want adventure based holidays with customised itineraries just for them but inspired by the local natural beauty.

A background image of a person fishing in a lake, with a large purple circle overlay in the center. The person is standing on a wooden pier or dock, holding a fishing rod. The water is calm, and the sky is clear.

1 of the top 3 priorities

Was a customised offering
Tailored to the adventure
traveller

3 segments are priorities for all 5 markets



Culturally
Curious

Social Energiser

Great Escaper

What do Social Energisers want from experiences?



Spontaneous - unplanned

'Out of the Ordinary'

'Packed' Experiences – busy day to night

'New' things

Festivals and Street Events

'In' Places where the locals go

Social Energisers & Adventure

- Activities and sociability.
- They are ideal targets for high energy activities with a social outlet in the evenings.



What do the Culturally Curious want from experiences?



Authentic & Mind Broadening Experiences

To feel like they've 'done' a place – not just dipped their toe in

Total Immersion

Getting off the beaten track

Connecting with nature

The Local Specialities

Culturally Curious & Adventure

- Ideal - 90% Soft Adventure
- They are attracted to walking, hiking, cycling etc.
- Off the beaten track.



What do Great Escapers want from experiences?



Multi-Sensory 'earth beneath their feet' & breath-taking attractions
Quality time to connect & bond
Rebalancing – come home refreshed and revitalised
Down time with some Peace & Quiet

Great Escapers & Adventure

- Great & Remote Outdoors
- Adventure is of a nature that they enjoy – walking in Sheep's Head, Cycling on the islands



Adventure Proposition

The concept:

‘Adventure... it’s in our nature’

‘Where the breath taking island landscape collides with the rich fabric of history and culture you are immersed in a surprising diversity of exciting and memorable experiences that make Ireland the easy choice for Adventure.’

The proposition: (narrative)

Ireland, an island within easy reach, where you can immerse yourself in a surprising variety of exciting active in-nature experiences each anchored in the breath-taking landscape, steeped in stories, myths and legends, the living story of vibrant, modern, welcoming Irish people.

The benefit:

‘Awaken the adventure within and leave feeling reinvigorated through its variety of surprising and diverse memorable experiences’

Key Themes

SURPRISING VARIETY OF EXCITING ACTIVE IN NATURE EXPERIENCES

BREATH TAKING LANDSCAPE

ADVENTURES NEED ENABLERS - WARM FRIENDLY SOCIABLE PEOPLE WHO MAKE ADVENTURE EASY

STEEPED IN LIVING STORIES OF ITS PEOPLE, MYTHS AND LEGENDS

MEMORABLE IMMERSIVE EXPERIENCES

(RE) AWAKEN YOUR SENSES

EXPERIENCES EXPLAINED

A GUIDE TO UNDERSTANDING AND DEVELOPING MEMORABLE TOURISM EXPERIENCES



Experience Development Toolkit and Supports available at www.faitireireland.ie





Adventure Travel World Summit Update Killarney, Co Kerry , 6 – 9 October 2014

- **650+ delegates attending, representing influential top global media and buyers**
- **200+ delegates expected to attend Pre Summit Adventures (PSA's) for 3, 4 and 5 days prior to ATWS.**

ADVENTURE TRAVEL WORLD SUMMIT IRELAND 2014

OCTOBER 6-9 / KILLARNEY

[Home](#)[About ATWS](#)[About Ireland](#)[Map of Ireland](#)[Contact Us](#)[PRE-SUMMIT ADVENTURE](#)[DAY OF ADVENTURE](#)[ACCOMMODATION](#)

BOOK YOUR FIELD-BASED ADVENTURE

Filling up fast!



30 Different Options for Field Based Day of Adventure

The deadline for registration is August 31st, 2014 unless otherwise marked. ATWS delegates will be free of charge. Any questions can be directed to atws@odysseyintl.ie.

196 DAYS UNTIL THE
ADVENTURE TRAVEL
WORLD SUMMIT 2014

[add to calendar >](#)



[Book Your Pre-Summit Adventure](#)



[Book Your Day of Adventure](#)



[Book Your Accommodation](#)

[Home](#)[About ATWS](#)[About Ireland](#)[Map of Ireland](#)[Contact Us](#)[PRE-SUMMIT ADVENTURE](#)[DAY OF ADVENTURE](#)[ACCOMMODATION](#)

196 DAYS UNTIL THE ADVENTURE TRAVEL WORLD SUMMIT 2014

[add to calendar >](#)

Pre-Summit Adventure

"Ireland .. where adventure is in our nature!" We are delighted to invite 2014 ATWS delegates to enjoy one of the 20 exciting Pre-Summit Adventures in our breath taking and engaging landscape. We're a land steeped in stories, myths and legends recounted by a vibrant, modern and welcoming people. Don't miss the chance to experience first-hand the surprising diversity of exciting and memorable adventure experiences that are on offer – book now to avoid disappointment! We look forward to seeing you in October and to extending a warm Irish welcome to you.

Deadline for all PSA registration is September 1st, 2014 unless otherwise marked. Questions can be directed to atws2014@odysseyintl.ie.

[Please click here to view a map of Ireland](#) with the areas being featured by the Pre Summit Adventures.

A limited number of hosted places are being held for international buyers, specialty travel advisors and media with a particular interest in featuring Ireland - subject to approval and availability. To apply, please click the [Application for Buyers, Travel Advisors and Media](#)."

Activity Level:

Nights:

Departing:

[GO >](#)

#1 Giants, Cliffs, Fjords and Seaweed...

Walk, horse-ride, cycle and drive through some of Ireland best and least know scenery and 1000's of year of fascinating history – right



#2 The Edge of the World

Spectacular walks, legendary castles, sea-kayaking with seals, ancient archaeological sites, top-class mountain biking and much



#3 Castles in Wild Places

Stay in an historic stately home and an exquisite private Castle; enjoying spectacular hikes en-route.



Thank You !