Agri-Tourism Conference 2018

In celebration of

GALWAY, WEST OF IRELAND 2018
EUROPEAN REGION OF GASTRONOMY

In association with

Céigse
Community Development
Galway County Council

Fáilte Ireland
AGRI-TOURISM
The diversification opportunity
IRELAND’S TOURISM INDUSTRY
TOURISM IS A VITAL PART OF THE IRISH ECONOMY

• Tourism **employs** 240,000 (up 15,000 in 2017)

• Tourism delivers **€7.2b in expenditure** (35% on Food and Drink)

• Tourism delivers **€1.7b in exchequer revenue**

• Tourism **sustains communities** and drives regional development in a manner that most other industries struggle to deliver
TOURISM IS A SIGNIFICANT EMPLOYER

• Every €1m of tourist expenditure helps support 27 jobs

• With 240,000 employees, tourism employs over 10% of workforce
TOURISM IS GROWING

Tourism is one of Ireland’s biggest indigenous industries and it is growing

<table>
<thead>
<tr>
<th>Metric</th>
<th>2017 vs 2016</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overseas Tourists</td>
<td>+3%</td>
<td>9m</td>
</tr>
<tr>
<td>Overseas Spend</td>
<td>+6%</td>
<td>€4.9b</td>
</tr>
<tr>
<td>Domestic &amp; NI Spend</td>
<td>+4%</td>
<td>€2.2b</td>
</tr>
<tr>
<td>Total Tourism Spend</td>
<td>+4%</td>
<td>€7.2b</td>
</tr>
<tr>
<td>Employment</td>
<td>+15,000</td>
<td>240,000 jobs</td>
</tr>
</tbody>
</table>

Source: CSO & Fáilte Ireland estimates
HUGE GROWTH IN OVERSEAS TOURISTS

Overseas tourists up 43% since 2012 with an estimated 9m overseas tourists in 2017

Source: CSO, NISRA & Fáilte Ireland estimates
GROWTH IN TOURISM IS AN UNSTOPPABLE FORCE

Driven by:

• World Tourism Organization UNWTO global growth rate of 7%

• Changes in lifestyle, economic wealth and population profiles

• Increased access to Ireland by air and sea
FÁILTE IRELAND’S ROLE IN THE TOURISM INDUSTRY
Fáilte Ireland’s Role in the Tourism Industry

FÁILTE IRELAND IS AT THE HEART OF THE TOURISM INDUSTRY

Our role is to:

• **Invest** in tourism infrastructure
• **Support** the tourism industry
• **Promote** Ireland as a holiday destination
Fáilte Ireland’s Role in the Tourism Industry

Strategy

GOALS

SUSTAINABLE GROWTH MODEL

BRAND ARCHITECTURE

STRATEGIC IMPERATIVES

STRATEGIC DRIVERS

BRAND IRELAND

REGIONALITY

SEASONALITY

Revenue
Overseas Visitors
Domestic Trips
Employment
Tax Revenue

Relevant to:
Meet in Ireland
Ireland’s Hidden Heartlands
Dublin
Wild Atlantic Way

Building
Brilliant
Visitor
Experiences
Supporting
Development
of a World
Class
Industry
Supporting
Development
of a Visitor
Friendly
Infrastructure & Community
Working with
TI on Marketing
& Sales to
Overseas Holiday Makers
Marketing & Sales to ROI
& NI Holiday Makers
Attracting
International
Business & Events Visitors

Whole of Govt Approach
Access to Tourism Assets
Infrastructural, Transport & Orientation
Education
Visitor Information
Community & Environment

Market
Diversification
Digital Ecosystems
International Publicity
Business Development

Target Audiences
Marketing Comms
Digital Ecosystem
Business Development

Conferences
Incentives
Events

Attracting
International
Business & Events Visitors

Research & Insights

Environmental Sustainability
Tourism Coordination Structures

Attractions
Activities
Festivals
Air/Sea Ports
Accommodation
Other Industry Partners
Accessible Tourism

Visitors

Go

Growth

Sustainability

Architectural

Imperatives

Drivers

Enablers

Benefits

Revenue
Overseas Visitors
Domestic Trips
Employment
Tax Revenue

Meet in Ireland
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Incentives
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Research & Insights

Environmental Sustainability
Tourism Coordination Structures
TOURISM IN REGIONAL COMMUNITIES

• Tourism plays a vital role in supporting regional communities particularly in the west and midwest areas

Source: Central Statistics Office
Where do overseas visitors come from?

These 4 make up 70% of total visitors.

41% 17% 7% 6%
Now, most tourists seek out quality, local offerings that represent the places they go to.

Once upon a time the majority of tourists looked for experiences that were familiar to them.

Source: Food Tourism, Stanley&Stanley, 2015
Food is more important than ever

• 50% of global travelers say food and drink is more important now than it was 5 years ago.

• 64% of consumers are interested in where their food comes from.

• 93% of visitors to Ireland took part in a food or drink experience (outside of eating and drinking)
SOCIAL ENERGISERS

LOOK FOR:
- A laugh, sharing adventure with friends
- New experiences, new places
- Spontaneity, fun
- “WOW” factor

CULTURALLY CURIOUS

LOOK FOR:
- Independence
- Authenticity
- Real insight
- People to educate them and show an interest

GREAT ESCAPERS

LOOK FOR:
- Connection with the landscape
- Quality time with loved ones
- Down time between activities
• Authentic accommodation
• Connection with a real way of life – Irish for a day
• Immersive Experiences – make you own, catch and cook
• Guided farm walks and tastings
• Farm to table dinners and lunches
Great Escapers

- ‘Off the beaten track’ accommodation
- Self guided walks and trails
- Non intrusive dining such as local food packs and picnics
- Family enriching experiences – collect your own eggs
Social Energisers

- Quirky Accommodation
- ‘Bucket list’ experiences – milking a cow and making cheese.
- Non formal experiences.
- Convivial shared dining experiences.
- Socially responsible/Eco ethos
Food and eating are important social interactions, particularly for tourists. It gives them an insight into the culture of a country and also the daily lives of the country’s inhabitants, enabling them to experience it ‘like a local’.

Provenance and storytelling are essential to creating memories for consumer today. That desire to feel connected to a place and its history can be met easily through food and drink inspired experiences.

The downtime at the end of the day is important time to reflect and food and eating/drinking enables this.

Irish food is important to all cohorts
Agri-Tourism Strengths

- Reputation for warm hospitality
- Stand out ‘Green’ credentials
- Close to source ingredients
- High quality, natural produce
Next Steps

• Link with your **local brand officer** to get involved via VEDP and trade portal.

• Access accommodation and experience development information on [www.FáilteIreland.ie](http://www.FáilteIreland.ie)

• Content on [www.Irelandscontentpool.com](http://www.Irelandscontentpool.com)
Thank You
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