



ENHANCING IRISH FOOD EXPERIENCES

THE WAY FORWARD

FOOD TOURISM ACTIVITY PLAN 2014-2016



Fáilte Ireland
National Tourism Development Authority



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



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

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 Taskforce¹, 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.

¹ 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



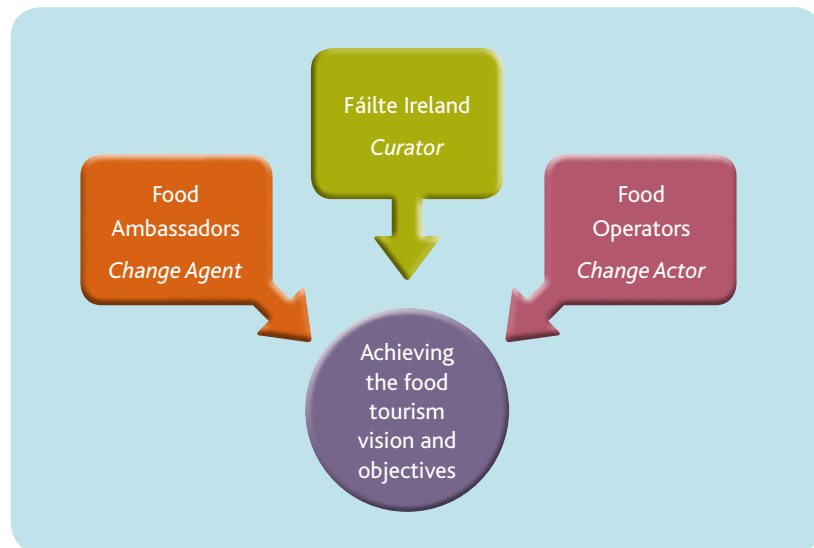
This section outlines the vision for food tourism over the coming period and describes the strategic priorities which will guide its achievement. It defines Fáilte Ireland's key objectives and outlines a new intervention model which is based on specific themes and activities designed to maximise reach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



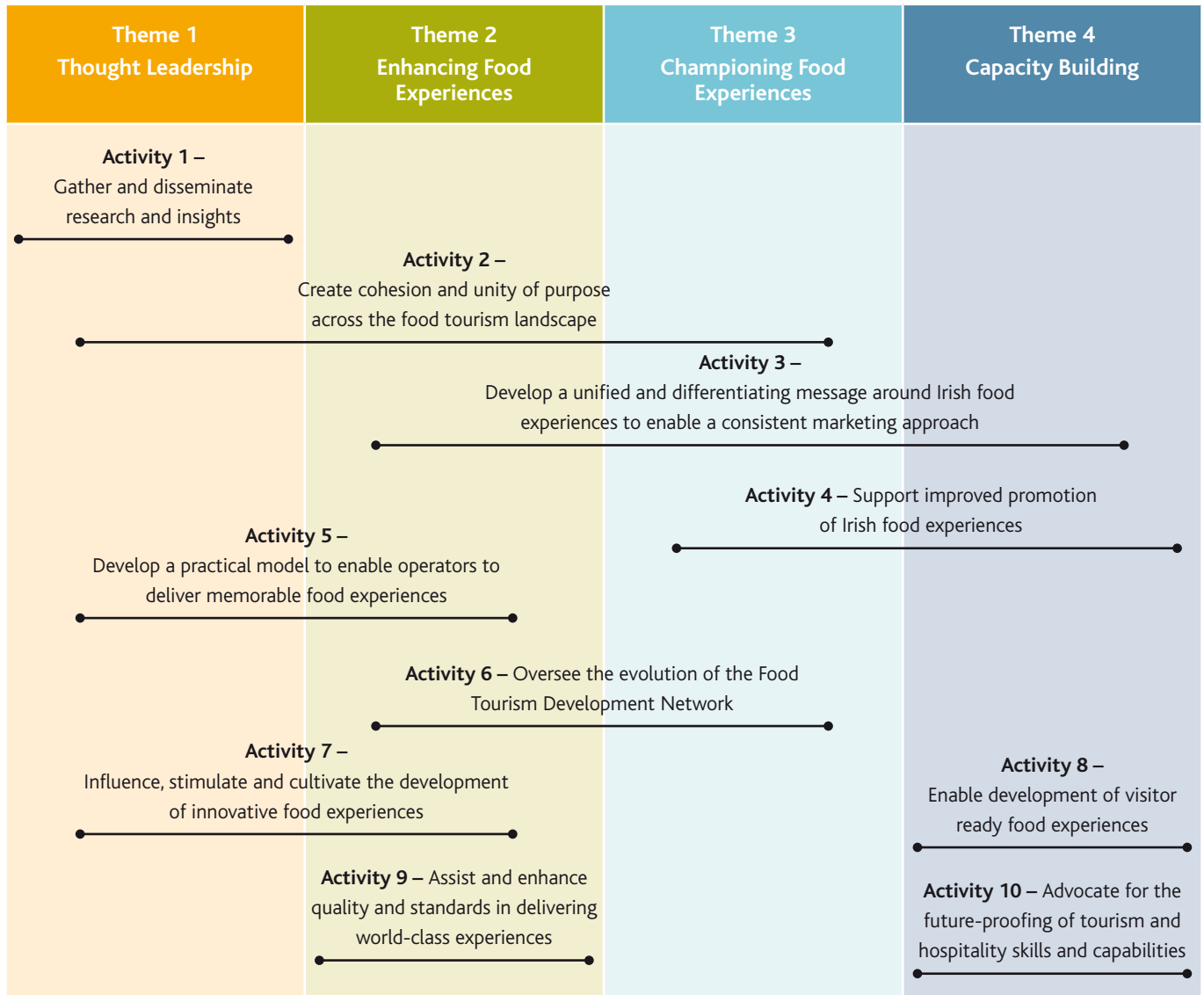
This intervention model will:

- 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.





Food Tourism Activity Plan 2014-2016



**Food is education and
experience: it is not only
for eating.**

*Food Ambassador, JP McMahon,
Co. Galway*

Introduction

International tourism is undergoing a transformation in how it is developed, managed and marketed, which has important implications for all destinations. As visitor expectations continue to rise, and competition intensifies, tourism managers globally are now seeking to differentiate their market offerings in meaningful terms. This has led to a shift from the previous focus on individual products and services to a concern for the totality of the experience, and particularly how to make it unique and memorable. This transition towards experiential models is the antithesis of mass tourism and seeks to immerse visitors into local cultures and communities. Moving from a product-based approach to one centred on creating memorable experiences for visitors clearly represents a significant challenge for any destination.

An extensive review of Irish tourism performance has indicated that to achieve sustainable growth within this new paradigm, the industry here must also produce and deliver authentic and compelling experiences that, by definition, cannot be found elsewhere. In response, Fáilte Ireland is committed to transforming the Irish leisure tourism offering by leading its evolution from a product to an experience model based on market insights. A further strategic consideration for Fáilte Ireland is the wider national economic context, whereby the organisation will now be expected to achieve more with less.

Rationale for the Food Tourism Activity Plan 2014-2016

An important component in any visitor experience is the quality, value and authenticity of food encountered throughout the stay. In recognition of this fact, Fáilte Ireland led the introduction of the *National Food Tourism Implementation Framework 2011-2013* (the 'framework'), a stakeholder-driven and consumer-focused initiative which was designed to improve the range, quality and availability of food tourism products, events and activities to help drive visitor satisfaction and deliver long-term growth and sustainability. The overall aim of the framework was to enhance 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.

This approach was validated in an OECD study which succinctly captures the contribution that food makes to tourism development, and in achieving broader economic objectives. "Food and tourism play a major part in the contemporary experience economy. Food is a key part of all cultures, a major element of global intangible heritage and an increasingly important attraction for tourists. The linkages between food and tourism also provide a platform for local economic development, and food experiences help to brand and market destinations, as well as supporting the local culture that is so attractive for tourists."²

The framework was well received and in the intervening years much has been achieved as a result of its implementation, specific details of which are provided later in the document. Given the fundamental competitive and organisational changes

² OECD (2012), *Food and the Tourism Experience: The OECD-Korea Workshop*, OECD Studies on Tourism, OECD Publishing.
doi: 10.1787/9789264171923-en

highlighted above, the greater emphasis being placed on developing Irish tourism experiences and the significant role that food will play in that effort, the time is right to review the impact of the framework and look to the future.

In doing so, the intention is not to move entirely away from the overall vision and strategy identified when the framework was developed in 2011, but rather to explore how to sustain the momentum it has since generated, re-adjust priorities, and define how Fáilte Ireland can best enable those efforts within the context of a more focused strategy and limited resources. The Food Tourism Activity Plan 2014-2016 presented here evaluates and responds to a range of issues identified across three related questions:

<p>Where are we now?</p>	<p>Much has changed since the <i>National Food Tourism Implementation Framework 2011-2013</i> was launched:</p> <ul style="list-style-type: none"> • The economy has stabilised and the focus has now turned to recovery and growth – much of the projected growth in tourism will stem from international markets. • The many awareness-building measures arising from the framework have changed thinking about the composition and importance of food experiences. • Value for money concerns of visitors have eased somewhat in recent years. • The overall level of activity in food tourism has increased: <ul style="list-style-type: none"> • Agencies such as Bord Bia, food tourism marketing groups and representative bodies are actively involved; • The number, variety and quality of tourism-related food offerings in Ireland has grown steadily. <p>In refining the vision and strategic priorities for food tourism in the next period, these will be important influencers.</p>
<p>Where are we going?</p>	<p>The goal in the period 2014-2016 must be to build on recent food successes, whilst responding to important developments in Irish tourism:</p> <ul style="list-style-type: none"> • The positioning and branding of Ireland as a destination is changing – developments in food tourism must reflect those changes. • Fáilte Ireland’s priorities, and the resources available, have also changed – a more targeted approach to supporting food tourism will be required. • To create that focus, clear objectives must be established and related implementation activities identified. <p>These factors will directly influence the structure and content of the activity plan developed.</p>
<p>How are we going to get there?</p>	<p>A number of issues will determine how Fáilte Ireland contributes in future:</p> <ul style="list-style-type: none"> • The organisation will seek to play a leadership role, enabling the work of those stakeholders willing to actively engage and share ownership. • Fáilte Ireland will primarily support food tourism initiatives that have broad appeal to overseas visitors. • Collaboration between stakeholders at all levels must continue to be a feature of any future developments – all parties must contribute. <p>As well as guiding action, the Food Tourism Activity Plan 2014-2016 must inform stakeholders as to the precise role of Fáilte Ireland in developing Irish food experiences so that expectations are realistic.</p>

Every plate should tell a story as well as it paints a picture.

*Food Ambassador, Pádraic Óg Gallagher,
Dublin*



In preparing the Food Tourism Activity Plan 2014-2016, specific metrics will also be defined which can be used to gauge progress and measure success over time. However, the overall targets for any food-related initiatives in the period will be to:

- Contribute to the achievement of Fáilte Ireland’s stated goal 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 development initiatives.

It is worth emphasising that as the growth in visitor numbers and revenue will primarily stem from international markets, this in turn means that Fáilte Ireland must prioritise its interventions in food tourism towards those experiences that have greatest relevance for overseas visitors. 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).

The document contains four sections:

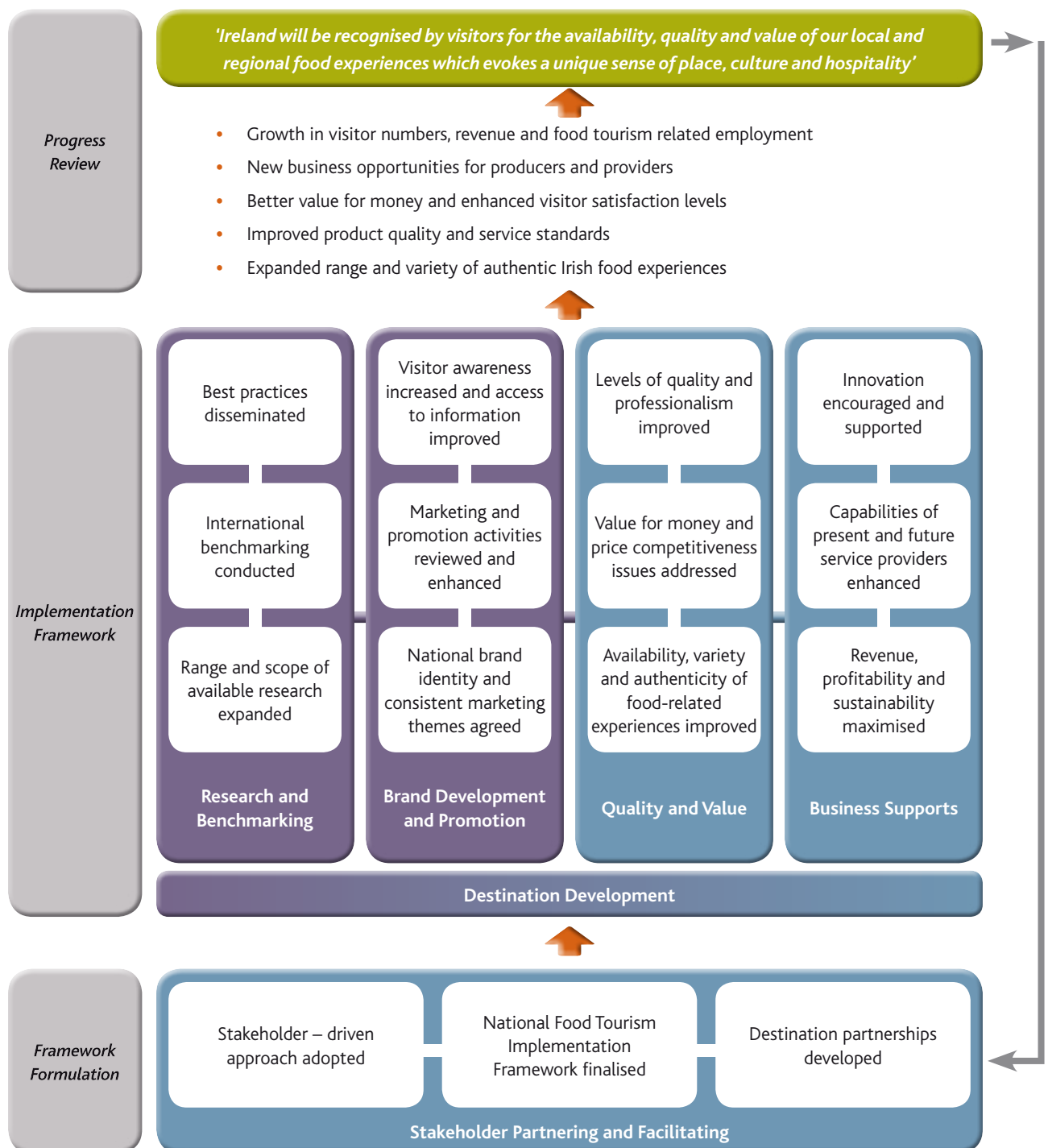


<p>Strategic Context</p>	<p>Section 1 – National Food Tourism Implementation Framework 2011-13 – Impact Assessment</p> <p>Section 2 – Experiential Tourism Explained</p> <p>Section 3 – The Future Direction for Irish Tourism</p>
<p>Fáilte Ireland Response</p>	<p>Section 4 – Enhancing Irish Food Experiences – Priorities and Plans</p>



Section 1 – National Food Tourism Implementation Framework 2011-2013 – Impact Assessment

In recognition of the growing importance of food tourism, Fáilte Ireland introduced a National Food Tourism Implementation Framework in 2011. The vision, strategy, key activities and deliverables outlined within the framework, illustrated below, were intended to ensure that all food tourism components exceeded visitor expectations and made a positive impact on their overall experience.





Apart from the range of actions that sprang from the ensuing implementation plan, the framework itself was a positive development for a number of reasons:

- It created a central focus to guide discussions and stimulate debate between diverse stakeholders.
- For the first time it moved the conversation away from food being viewed purely as a functional activity to it being considered in experiential terms.
- The framework also created a strategic map for the development of food experiences in Ireland, defining five key areas of activity:
 - Stakeholder Partnering and Facilitating
 - Research and Benchmarking
 - Brand Development and Promotion
 - Quality and Standards
 - Business Supports

This stakeholder-focused and holistic approach brought all relevant strands together which delivered a more cohesive model for the planning and delivery of change across the food tourism landscape. It also began the process of devolving ownership for implementation to industry stakeholders by engaging fully with them at all times.

1.1 Successes from the Framework

Prior to the introduction of the framework, a significant constraint on developing food tourism was highlighted as being a lack of up-to-date market knowledge. To begin addressing this concern, an important study on visitor perceptions regarding food was commissioned, leading to a revision and expansion in the food-related questions asked in the Holidaymaker Survey. These questions, introduced in 2012, cover areas such as the availability of distinctly Irish food, staff knowledge of food provenance, regional differences, service standards, and the all-round quality and value of the food offering. This greater sophistication in the analysis of visitor perceptions regarding food experiences will prove invaluable in the years ahead as it will deliver a better understanding of satisfaction levels and will enable discernable trends to be identified over time.

	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

The described changes have only taken effect since 2012, so a detailed year-on-year analysis of performance throughout the lifetime of the framework is not possible. However, a general comparison of the trends in visitor perceptions of their food experiences between 2010 and 2012 show that the implementation of the national framework has made a difference. Taking hotels and pubs as examples, the number of visitors offering the highest satisfaction ranking across quality, price and service dimensions has grown in all cases over the period, as shown.

1.1.1 Stakeholder Partnering and Facilitating

An important goal of the framework was to bring relevant stakeholders together so that common approaches could be agreed and applied to pressing issues. A number of important achievements were seen in this regard:

Working Group	<ul style="list-style-type: none"> A Working Group of 16 leading players in food tourism was convened to define a range of implementation measures to activate the framework. Having successfully accomplished their goals the Group’s activity came to a natural conclusion and was superseded by the Food Tourism Development Network in 2012.
Food Tourism Development Network	<ul style="list-style-type: none"> The Food Tourism Development Network is an industry think-tank currently comprising 22 peer-nominated Food Ambassadors. Through the network they have been exposed to food tourism innovation and best practice in both Canada and Norway, which in turn has influenced their approach to developing food tourism experiences within their region.
Destination Partnerships	<ul style="list-style-type: none"> Working relationships have been established with recognised international food tourism destinations like Canada and Norway. Valuable insights have been gained through benchmarking visits and international speakers/experts have attended bespoke food tourism forums in Ireland to share their knowledge with approximately 120 operators.



Case Study

Both the Boyne Valley and the Burren have brought groups of businesses together to deliver a schedule of unique food events. The Boyne Valley is using the food series to raise the profile of their foodie credentials; and the Burren are using it as a vehicle to encourage people to stay in the area longer. Both destinations report that the businesses involved have seen increased turnover as a result of their participation.

Fáilte Ireland also applied the partnership approach when seeking to enhance food tourism product offerings:

Food Festivals	<ul style="list-style-type: none"> The number of food festivals has increased by 30% since 2011 and many existing events have also extended their programming and event schedules. Additionally, over 90 food festivals received Fáilte Ireland support (financial and non-financial) since 2011.
Food Trails	<ul style="list-style-type: none"> Fáilte Ireland has advised and guided the introduction of two new food trails over the period: <ul style="list-style-type: none"> Dingle Peninsula Food & Drink Trail – incorporating 44 businesses committed to offering local ingredients. Burren Food Trail – involving 25 local producers and restaurants. As well as supported initiatives, the national food tourism framework has encouraged private sector projects such as The Gourmet Greenway developed by the Mulranny Park Hotel. The initiative created a food trail showcasing 13 artisan food producers in the vicinities of Mulranny, Newport, Westport and Achill.
Food Series	<ul style="list-style-type: none"> Fáilte Ireland has also established the Food Series concept which is a schedule of food-related events within a region, many of which can incorporate existing activities, spread over a 3-4 month period through the season. The Burren and the Boyne Valley have embraced this concept providing approximately 60 additional food events throughout the season in 2013 with further growth anticipated for 2014.
Emerging Irish Cuisine	<ul style="list-style-type: none"> It is essential, if Ireland is to build its reputation for food, that our cuisine becomes as recognised, known and valued as our food products. To strategically capitalise on the wealth of existing and potential culinary talent within the country, Fáilte Ireland partnered with Euro-toques and the Young Chef programme; created and supported a range of industry awards to recognise and promote emerging Irish cuisine; and shaped the itineraries of international food influencers and journalists.

1.1.2 Research and Benchmarking

Fáilte Ireland's overall aim here was to support fact-based planning and decision-making which would guide ongoing developments in food tourism. The implementation of the framework has resulted in the completion of a number of important studies:

Economic Impact Study	<ul style="list-style-type: none"> Research has been carried out in relation to the economic impact of food tourism which has helped to focus minds on the importance of this aspect of tourism.
Visitor Attitudes	<ul style="list-style-type: none"> An important study on visitor perceptions regarding food was commissioned, leading to a revision and expansion in the food-related questions asked in the Holidaymaker Study from 2012 onwards. To date, 16,000 visitors have been interviewed using this new approach. Their views on Irish food provide greater insight into satisfaction levels and will enable discernable trends to be identified over time.
Industry Focused Studies	<ul style="list-style-type: none"> Under its advocacy role, Fáilte Ireland has supported research in areas such as: <ul style="list-style-type: none"> An industry view of the 'Calories on Menus' initiative A study of 'Reducing State Imposed Costs on Tourism: The Case for Better Regulation' 'Analysis of the Impact of the VAT Reduction on Irish Tourism & Tourism Employment' prior to the 2013 budget <p>The findings of these studies were distributed to the relevant policy makers and stakeholders.</p>
Academic Research	<ul style="list-style-type: none"> Fáilte Ireland has also contributed to the academic sphere by supporting Irish food tourism-focused research which was presented at Research and Gastronomic Symposia in both Ireland and the UK, with approximately 215 participants and guests from Europe, America, and South America. Support was provided for academic research around 'Developing Food Tourism Networks' which resulted in the production of an industry-focused practical manual. The World Food Travel Association invited Fáilte Ireland to submit a chapter entitled 'Ireland's journey towards best practice in food tourism' for their book, 'Have Fork Will Travel', published in 2013.

Ireland lives up to its reputation for beauty, warm people, rich history, beautiful woods and great beer. But the best-kept secret may just be the provenance of its meat, and the diversity of the culinary delights that await those with an adventurous palate.

Carrie Oliver, Ensemble Vacations, 2013



1.1.3 Brand Development and Promotion

Since 2011, Fáilte Ireland has focused on identifying actions that would help to raise the profile and positioning of Irish food experiences. The implementation of the framework resulted in a number of important initiatives in this regard:

Promotions	<ul style="list-style-type: none"> Fáilte Ireland involvement in the Euro-Toques Young Chef of the Year programme has widened the appeal of the event beyond the confines of the industry to create a broader conversation about emerging Irish cuisine and modern Irish cooking in the media. The EAV for the 2013 campaign is €175k with a PR value of €524k.
Speaking Engagements	<ul style="list-style-type: none"> Representatives from Fáilte Ireland and the Food Tourism Development Network have been invited to speak about Irish food – and our food tourism journey – at key events, both nationally and internationally, ranging from Toronto Terroir to the Dublin Gastronomy Symposium, thereby raising awareness about Irish food tourism.
Media	<ul style="list-style-type: none"> The profile of Irish food experiences has been raised across a number of media platforms, integrated into the Discover Ireland domestic campaign, as well as targeted food specific campaigns. One such food specific campaign alone had a reach of 3.5 million.

A small country, Ireland nevertheless stands out for the variety, freshness and exceptional flavour of its native ingredients... Add to that the extraordinary talent in the kitchens of Dublin's Michelin-starred restaurants as well as in hole-in-the-wall cafés in the countryside, and you have nothing less than a culinary rebirth, a phoenix rising from the coal ash, deliciously.

Dara Goldstein, World Street Journal, 2013

1.1.4 Quality and Standards

In this area, Fáilte Ireland was concerned with contributing to ensuring that a high quality visitor experience is consistently offered across food tourism outlets:

Standards	<ul style="list-style-type: none"> Since 2011, over 1,300 days have been dedicated to training and mentoring. Through a range of supports, interventions assisting over 3,000 businesses and 12,700 individuals have enabled enterprises to remain competitive by adding value and maintaining standards through a difficult economic period.
Authenticity	<ul style="list-style-type: none"> The 'Place on a Plate' initiative was developed as a practical tool to encourage businesses to promote and deliver memorable food experiences for visitors. It was introduced through a series of nationwide briefing sessions, impacting in excess of 300 operators, combining international expertise and local knowledge to facilitate quality and consistency in delivery.

Supporting local producers is key to creating a great food destination with a unique sense of place.

Food Ambassador, Martin Bealin, Co. Kerry

1.1.5 Business Supports

An objective within the framework was to help industry operators build their capabilities and improve business performance by devising and delivering targeted and demand-driven business supports. A number of important outcomes were achieved in this regard;

Online Supports	<ul style="list-style-type: none"> An extensive suite of online food-focused business tools has been added to the Fáilte Ireland corporate website, including: <ul style="list-style-type: none"> Management tools for food businesses A guide to building the profile of a food festival Menu ideas and recipes, including heritage recipes A step-by-step guide to creating a food trail A guide to national and international food trends. Web activity reports indicate that the most frequently accessed pages are; 'Food Trends' and 'Developing Your Food Festival', followed closely by 'Food Trail Development' and 'Tools for Food Tourism Businesses.'
Networks	<ul style="list-style-type: none"> Expertise, advice and on-going mentoring were provided to 11 food network groups throughout Ireland to encourage innovation and stimulate the development and enhancement of new and existing food experiences.

Collectively, these summary achievements demonstrate that the implementation of the framework has led to substantial outcomes since 2011 across a range of dimensions which have delivered immediate, and will continue to drive longer term, benefits. As well as these quantifiable results, the framework and the actions arising from it, have delivered other less tangible but equally important benefits in terms of changing perceptions about the role of food in tourism.

Successful food tourism depends on local businesses working together to promote a community.

Food Ambassador, Ross Quinn, Co. Clare

Food doesn't need to be complicated; it just needs to be good!

*Food Ambassador, Mary McGettigan,
Co. Donegal*

These include:

- Prior to the introduction of the framework, food tourism was frequently viewed in somewhat narrow terms as applying predominantly to visitors whose main travel motivation was food. Whilst an important aspect, research undertaken as part of the framework implementation highlighted the wider appeal of food for tourists.

Food Enthusiasts (10%)	Food Positive Tourist (80%)	General Tourists (10%)
<ul style="list-style-type: none"> • Food motivates travel; • Seek authenticity of place through food; • Concerned about origin of products; • Gastronomy as a means of socialising, sharing life with others. 	<ul style="list-style-type: none"> • Food motivates satisfaction; • Include food experience in larger tourism plans; • Enjoys regional specialities; • Interested in origin of product. 	<ul style="list-style-type: none"> • "Accidental culinary tourists" – show low levels of participation in most food-related activities.

- The research highlighted distinct categories based on the impact food had on their motivation to visit, or their evaluation of the experience once at a destination. The findings also indicated that:
 - The attitudes and satisfaction levels of Food Enthusiasts are important due to their opinion leader role.
 - The ultimate goal is to improve the appeal of Irish food for all Food Positive visitors.

Based on the many awareness building measures implemented under the framework, there is now a better understanding of the broader role of food in the visitor experience; and how, as with any experience, factors such as quality, uniqueness, presentation and service are all as important as the underlying product itself.

- Given the greater enthusiasm generally for Irish food generated by the implementation of the framework, this has created a momentum amongst industry stakeholders for taking more ownership for its development as they now see the financial rewards for doing so.

The importance of the above changes in mindset should not be underestimated as they have collectively added to the solid foundation which now exists to support future developments.

1.2 Conclusion

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 the intended outcomes. It is important to now build on that momentum in the years ahead. Although the priorities and approach to developing food tourism will change during the 2014-2016 period to reflect the ongoing transformation of Irish tourism, a key lesson from the first framework is the importance of agreeing a streamlined approach, based on defined needs, which has buy-in from stakeholders.

Research has shown that experiencing local food and beverages, which express the identity of a destination through culture and heritage, has become a sought after travel experience for visitors.

Fáilte Ireland, 2011

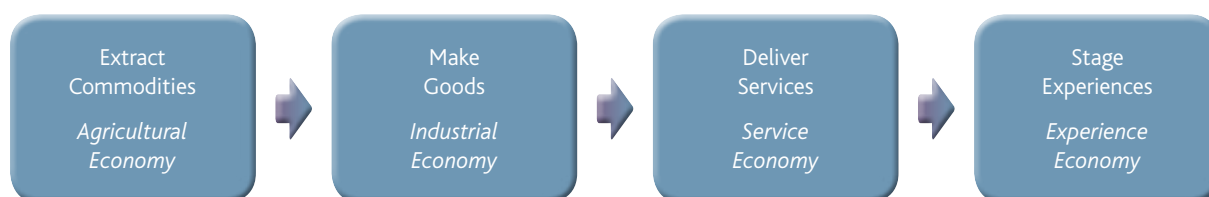
Section 2 – Experiential Tourism Explained



For many tourists today, travel is less about visiting a particular destination just to see things, or to involve themselves in a series of unconnected activities, than it is about trying to really connect with a place. Increasingly, visitors want to avoid the well-worn paths, the tourist traps, and they prefer to delve deeper into what a destination has to offer; and in the process to get to know the local culture and people in ways that enrich their lives and create lasting memories. This is the essence of experiential tourism – moving beyond the superficial to find meaning. In preparing a Food Tourism Activity Plan for 2014-2016 it is useful to explore the experiential tourism concept and identify where food experiences fit into the broader framework.

2.1 What is an Experience?

A tourism experience is multi-faceted and hard to define, combining elements like product (the place, its infrastructure, and the specific tourism products on offer), people (locals and the service offered by employees), activities, attractions as well as 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. At all times experiences respond specifically to defined expectations, engage the senses, animate a story, and create a lasting memory. 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. There are many factors driving the increasing application of the experiential concept in global tourism, not least of which has been the emergence of the wider experience economy over the past decade or more.



(Source: Pine and Gilmore's Progression of Value)

This progression in economic value can be summarised as follows. The agriculture-based economy dealt mostly with raw materials. The Industrial Revolution saw millions of people leave the fields for the factory; in the industrial economy, value was added by making goods from the raw materials. Over many decades, further economic prosperity and increased automation led to a growth in demand for services, which ultimately created the service economy. As competition increased within service industries, companies recognised that competitive advantage couldn't be sustained by delivering great service alone, which had become the norm; instead, to stay ahead of the competition, they increasingly added experiential components, creating what was termed by Joseph Pine and James Gilmore in a seminal Harvard Business Review article as the Experience Economy. They argued that in the experience economy, all businesses must orchestrate memorable events for their customers that engage them in an inherently personal way³.

This broader evolution in economic activity has naturally influenced tourism development too, particularly in recent years. Greg Richards, an internationally recognised tourism expert, has identified that there are a number of factors driving the change:

1. Desire by consumers for more fulfilling experiences

The growing search for experiences is linked to the increasing need for consumers to define their identity through the things they consume. People no longer consume just what they need, but they buy goods and services which express their lifestyle and identity.

2. The growing supply of experiences

As the provision of services becomes more competitive and services become easier to copy, there is growing competition among service suppliers. In order to distinguish their products, therefore, companies are adding more experiential elements, turning services into complete experiences.

3. The rise of co-creation

Producers are also recognising that they can link with the skills being developed by consumers, who now often know more about tourism products than the suppliers. This is leading to a system of 'co-creation', where companies work with consumers to develop new experiences. So what is emerging now is a series of 'communities' linking consumers and producers around a common interest rather than old fashioned distribution chains.

4. A need for new tourism models in cities

Competition between cities is also forcing them to re-think their traditional models of cultural tourism, which arguably have led to the massification of cultural tourism (standing in line for Gaudi or a quick glimpse of the Mona Lisa). This has decreased consumer satisfaction and also increased discontent among residents, who see their cities turned into open museums or theme parks.⁴

The global shift towards experiential tourism has already impacted on how Ireland is being developed and marketed as a destination and this in turn has direct implications for food tourism.

Case Study Donal Doherty of Harry's Restaurant in Donegal, has brought local food alive for his customers by establishing a weekly farmers' market at his restaurant. All the produce is sourced in the Inishowen peninsula and customers can talk directly to the people whose produce is served in the restaurant. Tours of their walled garden which supplies the restaurant can also be arranged.

³ 'Welcome to the Experience Economy', by B. Joseph Pine II and James H. Gilmore, Harvard Business Review, July 1998.

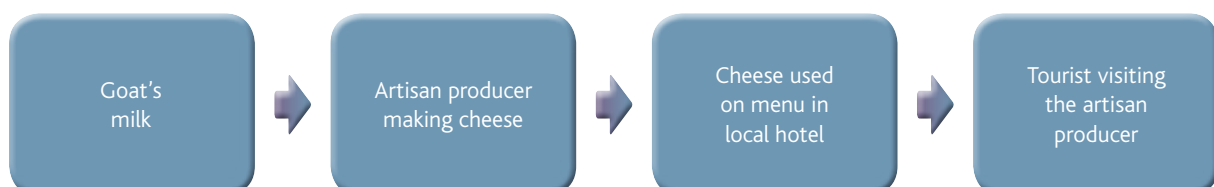
⁴ Interview with Greg Richards by Belinda Saile, El Pais 3 May 2013



2.1.1 Understanding Food Experiences

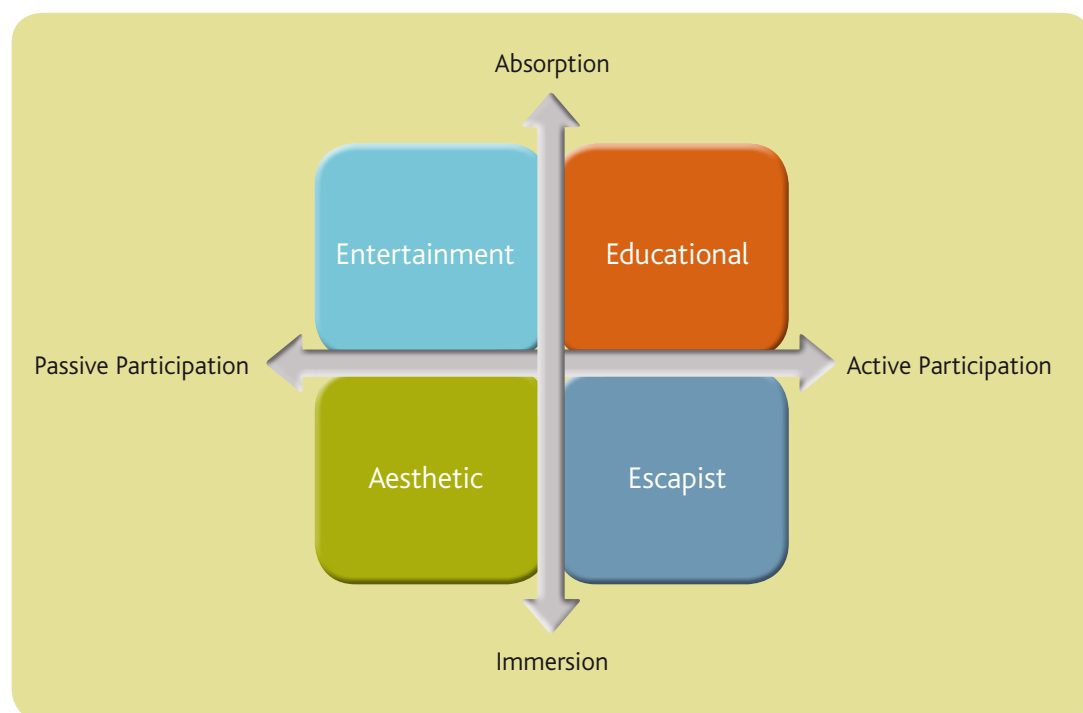
Food experiences come in many guises but regardless of its specific nature, what makes any experience memorable is how well it meets and exceeds consumer expectations; and that is achieved by knowing what they want in the first instance, responding to that, and, in the process, making the offering personal and authentic to the locality in some way. Just as the broader tourism experience integrates many components, so too does food: from the product, the surroundings or place, the people involved, the quality of the ingredients and perhaps some special twist in their preparation and/or presentation. By focusing on experiences rather than individual products and services, all existing food tourism operators can better differentiate their offerings in the marketplace, and often in the process, they can charge a premium in return. A product is generally relatively easily replicated, but a memorable experience is far harder to copy and this is where real competitive advantage can be secured.

Additionally, the experience concept can open up new opportunities for food producers and businesses that may not have previously considered themselves as being involved in tourism at all. A simple example of this might be:



In the example above, there is a progression from being a food producer to becoming an experience provider.

Another factor to consider for all food tourism operators is the level of participation offered to the consumer; the more captivating an experience, the more memorable it is likely to be because it utilises all the senses. A visitor can be actively involved in an experience or simply watch others doing so, or they can absorb the experience in their mind, or immerse themselves fully into it. In terms of how visitors interact with experiences, four realms have been identified based on the level of participation: **Educational, Aesthetic, Escapist, and Entertainment** as shown in the diagram.⁵



Applying this model to a visit to the artisan cheese producer mentioned above might lead to some or all of the following benefits for visitors:

- The cheese maker might offer classes whereby visitors could stay onsite, or locally, and learn how to make cheese. (Educational)
- The producer might provide a small garden area, or part of the farm, where visitors can take a stroll and simply enjoy the rural surroundings. (Aesthetic)
- During the visit the producer, or staff, might tell the history and stories associated with their product in an engaging and passionate way, really drawing the visitors in. (Entertainment)
- The customer can not only watch how cheese is made, but maybe get involved in it too, and taste the product as well, whilst sipping a glass of wine and overlooking the quiet rural landscape. (Escapist)

⁵ Pine and Gilmore (1999)

In reality all food experiences are usually a combination of some sort: of products, services and stories, and/or a mix of participation levels. Whatever their composition, the focus must be to combine all elements into immersive experiences that respond to defined visitor needs, are unique to a place, bring a compelling story to life, and in the process create lasting memories. A useful practical example of how a food experience can be made as immersive as possible is described below.

Case Study Progression from Producer to Experience Provider St. Tola's Cheese – Food Ambassador Siobhan Ní Ghairbhith

Located in the West of Ireland, near County Clare's wild Atlantic coast, St. Tola's multi award-winning goat cheese has achieved exceptional critical acclaim since its launch over twenty-five years ago and is now among the most sought-after artisan produce in Ireland.

In 2012, Siobhan was selected as a Fáilte Ireland Food Ambassador and travelled with thirteen fellow peer-nominated ambassadors on a benchmarking trip to Canada. The trip exposed Siobhan to the possibilities of diversification in her business through the conduit of experiential tourism.

'One of the main things I learnt from the benchmarking trip is the importance of giving a quality experience to the visitor, who is prepared to pay for this experience.'

Prior to the trip to Canada, St. Tola had offered ad hoc access to visitors providing a limited experience. In June 2013 Siobhan opened a visitor centre on the farm and had close to 700 visitors by the end of the first year. In addition, as a member of the Burren Food Trail, they hold a number of additional events at select times during the year.

These changes mean that now, their visitors can interact across the four realms ranging from passive participation to active participation. They offer farm tours where visitors can enjoy the *aesthetics* of their beautiful surroundings, an *educational and entertaining* insight into sustainable farming practices, how their cheese is made and the history of their operation, and finally they can taste the end result and purchase some to bring home from their newly opened farm-shop. For real *escapism*, on occasion, you can join them for a picnic on the farm surrounded by their goats and the idyllic and unique landscape of The Burren. <http://www.st-tola.ie/>



2.1.2 Managing Food Experiences

Responding to the experiential tourism trend clearly represents a challenge for operators and especially so in food tourism where the experiences come in many guises, from fine-dining to a visit to an artisan producer. To help guide efforts, 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:



Product

One of the core elements in managing a food experience is of course Product. It is important to note that 'Product' in this context includes the actual food offering, activity or event; the place within which it is prepared and/or presented – and that includes the immediate locality plus the physical surrounds of the actual venue or establishment.

Service

Service plays a vital role in any food experience and especially so in an Irish context. Ultimately, it is the people that can make the encounter memorable, or mediocre. Ireland has traditionally had a high standing internationally for the friendliness of its people and this raises the bar in terms of what visitors expect regarding service during their visit.

Two components are vital here:

Personality – Irish hospitality must be distinctive and constantly shining through, otherwise the service component does little to make the interaction stand out. It is essential that food tourism operators are not complacent about this issue; all employees who interact with visitors must be passionate about what they do, and understand the real difference they can make to visitor perceptions. Getting the right service-minded employees on-board begins with recruitment, but regardless of the size or type of food experience, all employees must receive continuous training on hospitality skills so that quality and service become a true source of competitive advantage for Irish food tourism.

Professionalism – in a modern service environment, especially where a premium is being charged, the skills and knowledge of employees is also important; visitors will undoubtedly make some allowances for skills deficiencies when the personality of service is right, but an unforgettable experience requires both components not just to be good, but great.

**The pleasure, rewards and memories
of good food experiences don't usually come
ready made in plastic wrapping on a shelf!
You have to work at them.**

*Food Ambassador, Ruth Healy,
Co. Cork*

Stories

Stories are the identified reason the food tourism product/activity stands out when it is consumed in Ireland rather than elsewhere. It is the stories that drive a unique experience and serve as a form of stimulus that transforms the offering into something beyond the norm. Stories are not limited to the spoken word and may entail visual stimuli that animate the story or history of a place. In fact, the communication of the story is often as important as the story itself. Where appropriate, a personal interaction – for example a guide, owner, or a passionate

employee – can relate the story and bring it to life, thereby making it more memorable and creating a bond between the visitor and the place. On other occasions the communication of the story can take different forms – from the authenticity of the surroundings and events, say, during a food festival; even packaging and menu presentation can animate a story; so too can interpretative signage at food-related attractions.

2.2 Conclusion

The following extract from an important OECD study on food experiences⁶ summarises well some of the issues highlighted in this section. "In the contemporary 'experience economy' sophisticated experiences are emerging that combine elements of education, entertainment, aesthetics and escapism to engage the consumer. As experiences become more complex and consumers become more knowledgeable and demanding, leisure and tourism markets have become more competitive, forcing suppliers to innovate and develop new service concepts. Food experiences for tourists form a vital part of the value network linking local food producers, suppliers and cultural and tourism entrepreneurs."

This general overview of what experiential tourism entails and how food experiences should be managed is important as it will later inform decision making as to how Fáilte Ireland can best guide developments in the medium term.

⁶ OECD (2012), *Food and the Tourism Experience: The OECD-Korea Workshop*, OECD Studies on Tourism, OECD Publishing. doi: 10.1787/9789264171923-en



Section 3 – 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. This section provides that context by describing how Ireland is being marketed at home and abroad and summarises Fáilte Ireland's strategy, both of which are factors that influence the structure and content of the Food Tourism Activity Plan 2014-2016.

3.1 The Marketing of Ireland at Home and Abroad

The global and domestic recession from 2008 onwards clearly had major negative consequences for Irish tourism but one positive outcome from the downturn was that it has led to a fundamental review of the industry and a redefinition of strategic priorities, target markets and segments. As a result of the extensive research undertaken by the Tourism Recovery Taskforce⁷ 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 are therefore worth serious consideration.

3.1.1 The International Market

The flowchart on page 36 captures some of the main elements in how Ireland is currently being developed and promoted to compete in international markets. The diagram emphasises how the overseas marketing of Irish tourism is now even more focused and based on the revised targeted markets and segments. The model further demonstrates the integrated nature of the overall experience development framework for Ireland and the fact that all developments are ultimately founded upon compelling stories.

⁷ 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.

It is not enough to be product ready; you must also be visitor ready. Communicate a clear message and have an area where you can offer hospitality and people can taste/engage with food story.

Food Ambassador, Deborah Evers, Co. Clare

3.1.2 The 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 food 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. Food has a key role to play in supporting the delivery of promises made to international and domestic visitors alike; as a consequence, those involved in food tourism must consider their offerings within this broader context and ensure that what they offer is aligned to the national and/or local experiential themes and stories.

Adopt an ethos to serve good food, simply prepared with a commitment to use locally sourced, preferably organic seasonal produce.

*Food Ambassador, Brid Torrades,
Co. Sligo*

3.2 Fáilte Ireland Strategy

Fáilte Ireland's primary objective during the worst years of the recession was to help the industry to cope and respond to the unprecedented challenges faced. As the economy strengthens, the organisation is now concerned with supporting recovery and growth. Fáilte Ireland's vision for 2014-16 is defined as: *To promote and facilitate sustainable growth in Irish tourism by supporting competitive tourism enterprises to develop, sell and deliver valued, authentically Irish tourism experiences to new and repeat visitors.* It must achieve this vision at a time when the level of resources available is constrained – therefore, the organisation can no longer sustain its past expansive brief but must instead concentrate on areas where it can add greatest value. The defined organisational goals for 2014-16 are:

1. To transform the Irish leisure tourism offering by moving from a "product" model to an "experience" model that is driven by market insight. This will be specifically achieved by implementation of an Experience Development framework and process based on global best-practice.
2. To upgrade the ability of the leisure tourism trade to communicate and sell to their consumers, with a particular focus on ensuring the strongest possible digital and online capability and presence for Irish offerings.
3. To focus the national events policy on larger-scale events that explicitly support or are integral to leisure tourism "experiences", or are capable of delivering incremental overseas visitor growth in their own right.
4. To identify and drive the growth opportunities in business tourism and to continue to support the business tourism trade in attracting high-yield overseas visitors on a full-year (counter-seasonal) basis.





Specifically, Fáilte Ireland is working towards the achievement of ambitious growth targets for visitor numbers, foreign earnings and tourism related employment by 2016, which include:

- Achieve 7.5 million visitors
- Increase revenue by 22%.

As stated earlier, much of this growth will come from international markets; consequently, in terms of enhancing Irish food experiences, Fáilte Ireland must primarily direct its attention to those offerings that have greatest appeal and relevance for overseas visitors.

3.3 Conclusion

The review of the planning context for 2014-2016 has highlighted a number of important factors which must be accounted for as the way forward is plotted:

- International tourism is undergoing significant change as visitor expectations evolve.
- As a result, the manner in which Irish tourism is developed and marketed is also experiencing a transformation.
- Due to resource constraints, Fáilte Ireland's strategy is changing too and the organisation must transition from playing a highly expansive role in supporting the industry to one which informs developments, serves as a catalyst for change, and enables the work of those stakeholders that are willing to play a leadership role in the industry.
- Much has been achieved in developing food experiences in Ireland and the focus in the medium term must be to ensure that future developments happen in line with the wider national experience development framework.

The following section outlines the priorities and plans for enhancing Irish food experiences from 2014-16.

Section 4 – Enhancing Irish Food Experiences – Priorities and Plans

This section outlines the vision for food experiences in tourism over the coming period and describes the general 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. Detailed activity plans are also provided.

4.1 The Size of the Prize

To focus minds, it is worth highlighting the economic contribution of food experiences in tourism. Based on a commissioned study⁸, the direct contribution of expenditure on food and beverages in the year 2012 is shown in the table below.

Direct Contribution of Expenditure on Food and Beverages in the Irish Tourist Market to Irish Economy	
<i>Expenditure</i>	<i>(€ millions)</i>
Food Goods and Services	
Inbound Tourist	1170
Domestic Over-Night Stays	747
Domestic Same Day	1544
Total	3461
Employment (FTE – 000s)	49
<i>Values are calculated using the Irish Input Output Tables (CSO, 2009)</i>	

The table above shows the direct value of tourism expenditure in 2012 and includes expenditure on food and beverages (€3.5 billion) and employment 49,000 FTEs jobs. Direct expenditure on food and beverages in the tourist market is 3.7% of GNP. Overseas visitors account for 35.7% of the expenditure on food and food services, 44.6% was spent by same-day trippers and 40.7% by domestic overnight tourists. Whilst more difficult to calculate, indirect spend which incorporates the re-spending of money within the local economy, also has a significant impact on the overall contribution of tourism food and beverage expenditure to the Irish economy. For example, restaurants purchase food supplies from local producers or distributors in order to deliver their service and they pay their staff who in turn purchase goods and services locally.

Overall Contribution (Direct and Indirect) of Tourism Food and Beverages Expenditure to the Irish Economy – 2011		
<i>Impact</i>	<i>Expenditure (€ millions)</i>	<i>Employment (FTEs – 000s)</i>
Direct	3461	49
Indirect	3876	47
Total	7337	96

⁸ Economic Value of Food in the Tourism Product in the Irish Economy, Richard Moloney, Marie Ryan, and Martin Kenneally, University College Cork, February 19, 2013

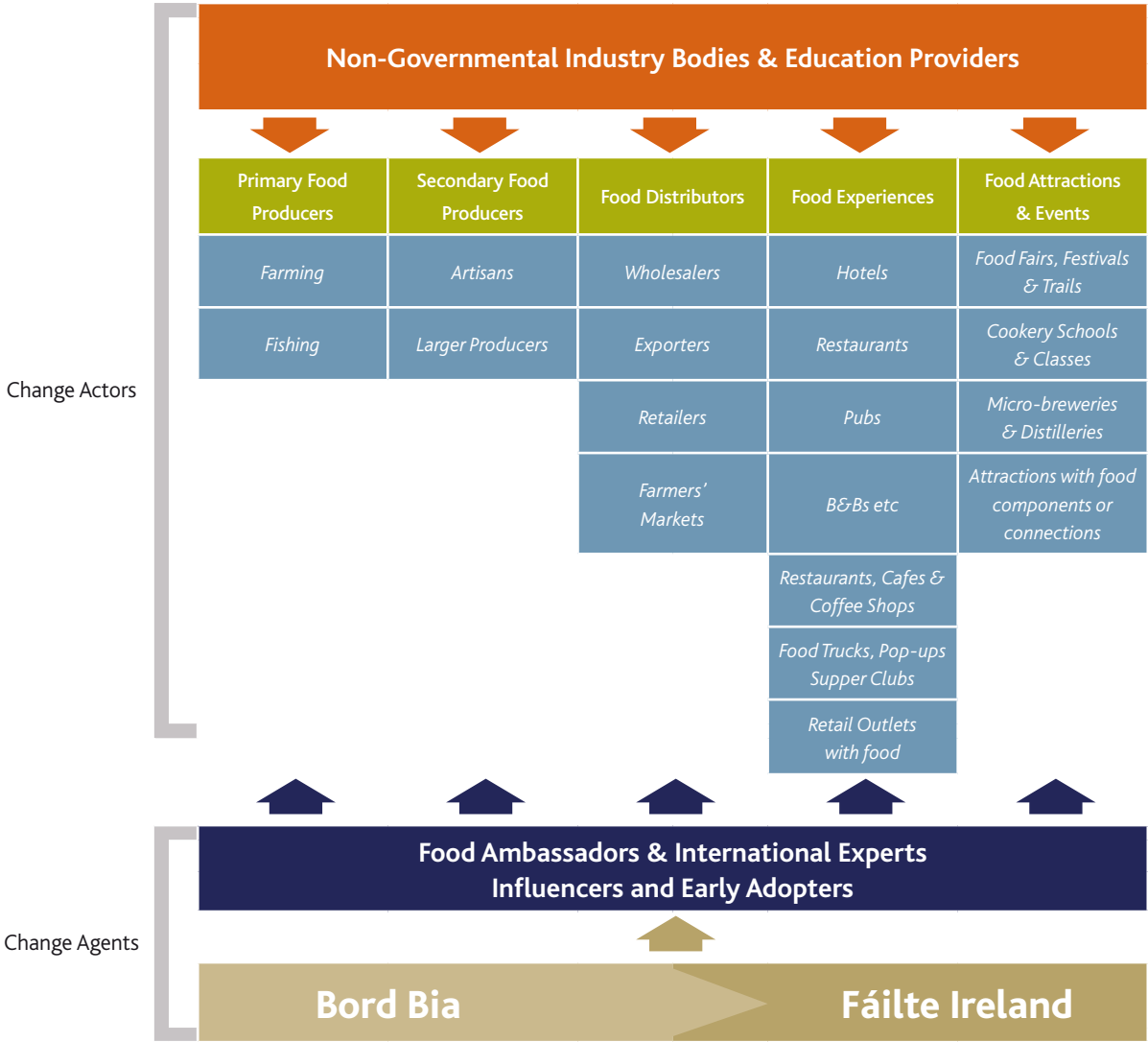
Total contribution of expenditure on food and beverages by tourists was €7.3 billion supporting 96,000 FTE jobs. This means total tourism expenditure related to spending on food and beverage services was approximately 5.6% of GNP in 2011. Employment related to these activities was related to 5.3% of the labour force.

This data emphasises the importance of food experiences and clearly makes the case for continued support and development of food tourism. Fáilte Ireland is committed to doing what it can to enable food experience providers to deliver memorable experiences and will outline where it can make the greatest contribution. However, the industry itself, from representative bodies down to individual operators, must play their part in enhancing Irish food experiences.

4.2 Shifting the Emphasis

Before outlining the priorities for the period ahead, it is worth identifying a number of changes in emphasis that will influence how Fáilte Ireland interacts with food tourism stakeholders. The range of interested parties related to food experiences is extensive and can be summarised as follows:

The Food Tourism Landscape





In the first instance, the diagram of the food tourism landscape highlights the diversity of players involved. To avoid duplication of effort or lack of integration, a collaborative approach under an agreed vision is therefore essential and all relevant stakeholders must play their part. The diagram also indicates that it is not practical for Fáilte Ireland to provide intensive support to all stakeholders across such a fragmented landscape. In any case, not all stakeholders described above are involved in tourism, and across the value chain, Fáilte Ireland can only concern itself with those entities which are substantially involved in food tourism – and particularly with those involved in creating experiences for overseas visitors.

The above model further highlights that Bord Bia makes a substantial contribution to the success and development of food tourism through the excellent work it does, both in developing Ireland's food producers and promoting Irish produce abroad, which is beneficial in the drive to improve the reputation of Irish food experiences. Bord Bia's 'Origin Green' initiative which supports Ireland's green, clean image is also helping to promote a strong food experience message.

4.2.1 Changing the Approach

In the past, Fáilte Ireland has largely adopted a directive role in defining and implementing an industry-wide food tourism strategy, via the national framework devised in 2011. 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 to generally change thinking on the role of food in tourism. Now that a solid foundation is in place, and given Fáilte Ireland's strategy, this previous level of support is no longer appropriate. In any case, the returns gained from enhancing food experiences are now fully evident, and the beneficiaries, i.e. food tourism bodies, operators and local communities, must individually and collectively take greater ownership for future developments.

A further recent lesson which has informed thinking about how Fáilte Ireland can strategically support food tourism has been the success of The Gathering in 2013. Some of its achievements included:

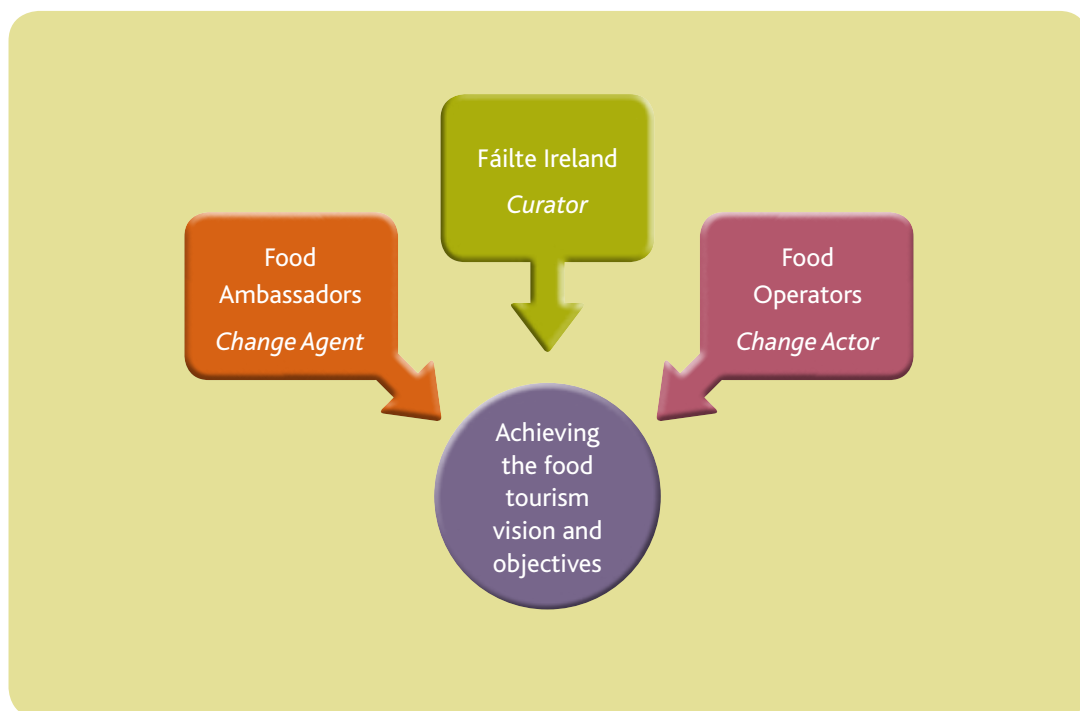
- The Gathering succeeded in mobilising communities all around Ireland to invite diaspora and friends to attend over 5,000 special Gathering events, many in counties that would not typically be regarded as tourist destinations.
- Preliminary estimates show that the project delivered at least 250,000 to 275,000 extra tourists in 2013 that would not have visited Ireland but for The Gathering – in other words, more than half (55%) of the additional visitors to Ireland last year came because of the initiative. The additional revenue generated by these incremental tourists is estimated conservatively to be €170m.
- Within the tourism industry, about one in three operators (35%) say they experienced increased business from The Gathering. Hotels benefited the most, with three in five (60%) reporting increased business as a result of The Gathering.
- Independent national research undertaken by Ipsos MRBI in October 2013 showed that 77% of respondents believed that hosting a gathering was a source of civic pride in their locality; 73% believed that organising a gathering had inspired people to work together in other areas to benefit the community.⁹

⁹ Source: Fáilte Ireland

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 deliver what is necessary to realise the vision and strategy;
- Offering targeted assistance to enable those efforts.

These lessons will be integrated into all food tourism 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 curator-type role, whereby it sets the overall framework and direction for enhancing food experiences, then guides and supports the efforts of others; be that in working with 'change agents' who can help influence those involved in tourism, or with a variety of 'change actors' – at national and local levels – who can make things happen in practice. Already, those Food Ambassadors involved in the Food Tourism Development Network have been consulted in the preparation of this activity plan to ensure that it responds to industry challenges and concerns.



4.2.2 Redirecting Attention

Much of the focus of the *National Food Tourism Implementation Framework 2011-2013* was at a national level in order to work with key players to achieve industry-wide goals. This was necessary to raise awareness nationally about the importance of food experiences in tourism and to maintain consistency of approach. Over the next three years, 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;
- Working with food ambassadors;
- Influencing education providers on how best to respond to identified capability gaps within food tourism in Ireland.

However, greater emphasis will now be placed on supporting the development of great tourism experiences nationwide, in line with the broader experience development strategy for Irish tourism. Fáilte Ireland will concentrate on providing the necessary guidance and support to stakeholders so that they can ensure that food offerings consistently make a positive contribution to the overall visitor experience.

4.3 Refining the Vision and Objectives

In 2011, 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'*. This vision remains largely relevant as it was already focused on an experiential model and highlighted key aspects such as uniqueness and the importance of culture and hospitality. However, as indicated earlier, much has been achieved in terms of the availability, quality and value of food offerings so some refinement of the vision would be beneficial to highlight next phase priorities.

Therefore, the refined 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 overall integration of food experience developments with broader national strategy.

4.4 Redefining Operations

Fáilte Ireland has identified a revised intervention model for enhancing food experiences over the next three years. The model, shown below, integrates the objectives defined above and identifies four themes and three key activities which are necessary to achieve them.

Food Tourism Intervention Model – Concept



A number of features of the model are worth highlighting:

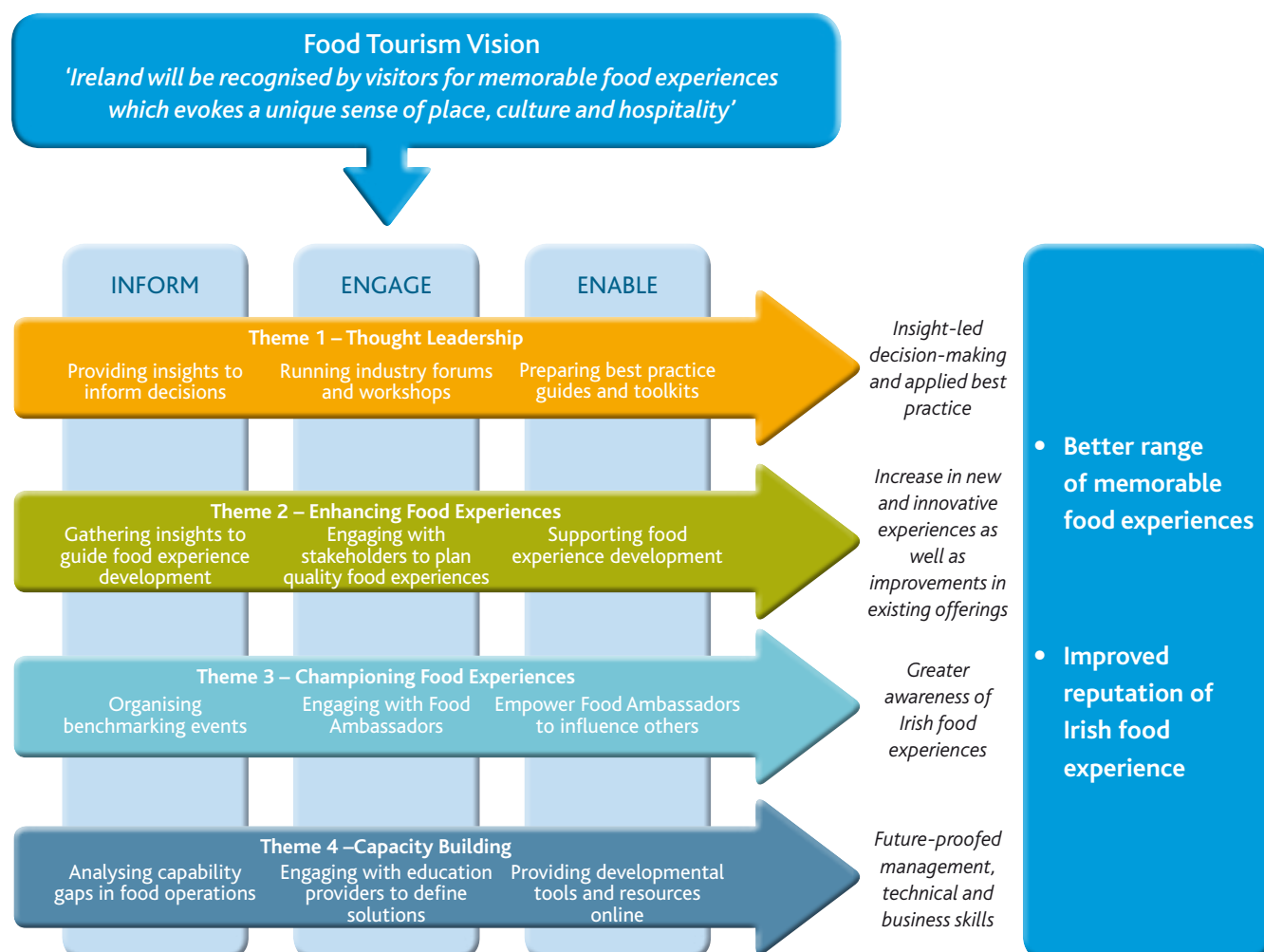
- The outer ring references some key factors that will impact on how Fáilte Ireland supports food tourism.
 - **National and Local Focus:** Fáilte Ireland's support for food experiences will have both a National and a Local focus. Nationally, headline activities will include generating insights and continuing to raise awareness of the importance of food in tourism. At local level, Fáilte Ireland will collaborate with groups of food tourism stakeholders to advise and guide them in the development of innovative and appealing food experiences.
 - **Quality Standards and Education:** In addition, Fáilte Ireland will remain concerned about quality and standards in food experiences and will ensure that quality principles and practices are integrated into all best practice guides and toolkits produced. Although Fáilte Ireland's education focus has shifted greatly in recent years from direct involvement towards an advocacy role, the organisation will liaise with education providers to help ensure that education policy and individual programme content are continuously supportive of current and future developments in food tourism.



- The model also demonstrates the four strategic themes which will guide Fáilte Ireland's activities, namely:
 - *Thought Leadership* – providing the necessary thought leadership for food experience development in Ireland by gathering and disseminating market insights and best practices.
 - *Enhancing Food Experiences* – partnering with internal and external stakeholders to enhance the range, scope and quality of food experiences.
 - *Championing Food Experiences* – working with Food Ambassadors and others to both promote existing food experiences and to influence the creation of new offerings.
 - *Capacity Building* – continuously identifying current and future skills and knowledge gaps within food enterprises – in areas such as management development, hospitality and service, technical skills, digital and marketing capabilities etc. – and liaising with education providers to influence potential solutions.
- Fáilte Ireland will concentrate all its efforts within these four themes and will address them through three main activities which are designed to deliver a wealth of memorable food experiences in Ireland:
 - *Inform* – providing the required insights to guide decision making.
 - *Engage* – working with a variety of stakeholders to advance the food experience agenda.
 - *Enable* – enabling the work of others through the provision of a range of direct and online supports, advice and mentoring.

The application of the food tourism intervention model is shown on page 46.

Food Tourism Intervention Model – Application



This intervention model will:

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

The intervention model will be operationalised through the activity map and plans explained under 4.5.



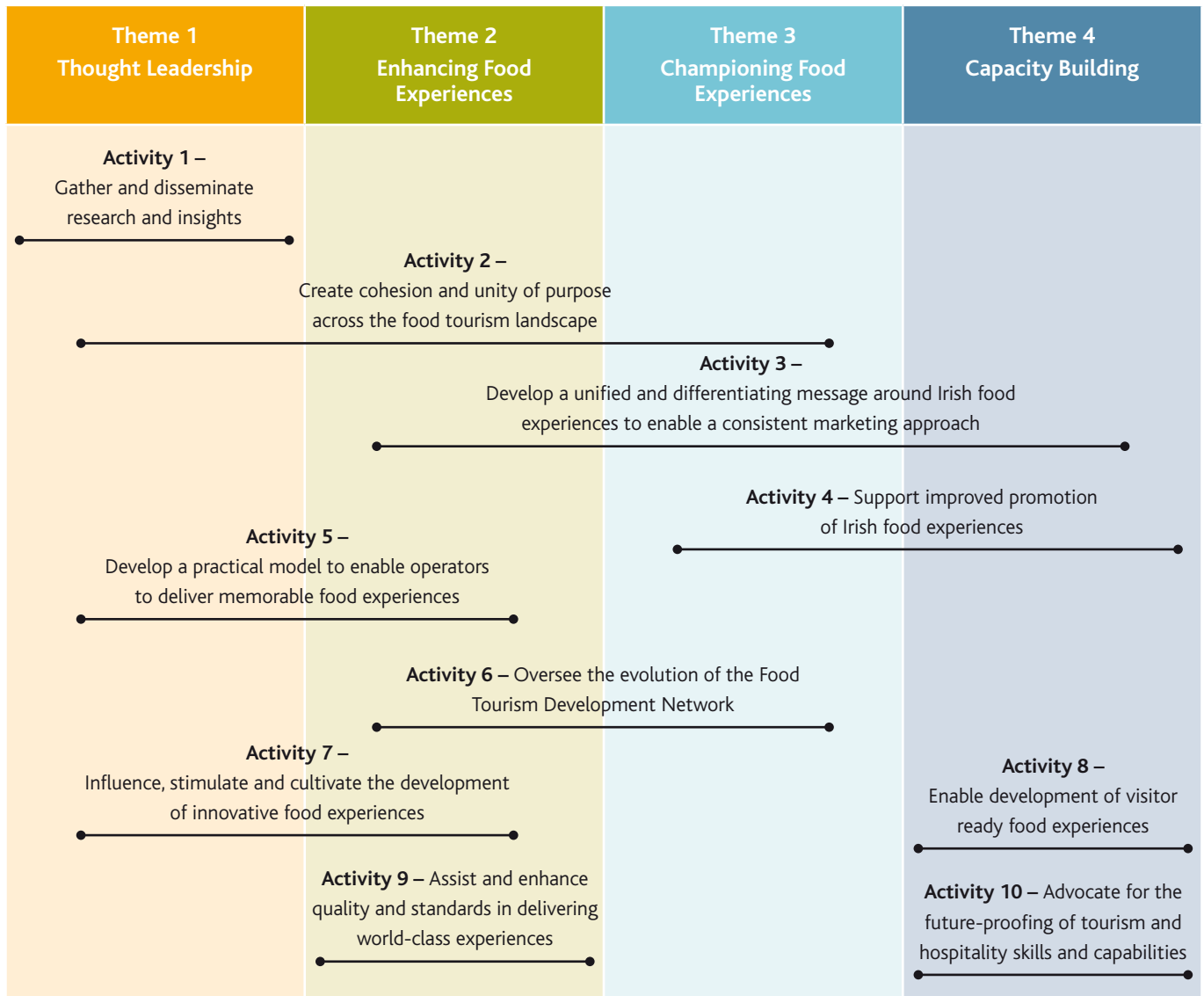
4.5 Food Tourism Activity Map and Plans 2014-16

The following activity map and related plans describe where Fáilte Ireland will tangibly contribute to the development of unique food experiences in Ireland in the years ahead and have been prepared following consultation with Food Ambassadors. In addressing the activities outlined, Fáilte Ireland, acting in the curator-type role described earlier, will continue to seek the active involvement of industry stakeholders across the food tourism landscape; indeed, continued success is heavily dependent upon that support being forthcoming.

As indicated throughout this document, the range of stakeholders in food tourism is extensive and each party must be willing to contribute to the wider development of food experiences; where appropriate, all key stakeholder groups should clarify and quantify their contributions through relevant strategies and plans. In doing so, there should also be strong coordination between all stakeholders so as to avoid duplication of effort or lack of coherence. To that end, the plans outlined are also intended to serve as a guide to others in their planning efforts, and Fáilte Ireland will always welcome collaboration with agencies, representative groups and local communities where common goals and measurable outcomes can be established and appropriate working relationships agreed.

4.5.1 Activity Map

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



4.5.2 Activity Plans

The attached plans expand on the headings within the activity map.

		Key Tasks
Activity 1 Gather and disseminate research and insights	→	Key Task 1.1 – Identify consumer needs and trends related to food experiences
	→	Key Task 1.2 – Identify food experience best practices through benchmarking
	→	Key Task 1.3 – Measure visitor satisfaction levels with Irish food experiences
Activity 2 Create cohesion and unity of purpose across the food tourism landscape	→	Key Task 2.1 – Streamline stakeholder engagement to improve clarity of communication and reinforce common vision
	→	Key Task 2.2 – Identify and utilise appropriate international expertise to encourage collective effort between food tourism operators
	→	Key Task 2.3 – Facilitate industry forums and events
Activity 3 Develop a unified and differentiating message around Irish food experiences to enable a consistent marketing approach	→	Key Task 3.1 – Develop the food tourism narrative in collaboration with operators and providers
	→	Key Task 3.2 – Develop and deliver resources and toolkit for use by operators to incorporate a consistent food message in their promotional activity
	→	Key Task 3.3 – Develop and implement a communication plan around the food tourism narrative
Activity 4 Support Improved Promotion of Irish Food Experiences	→	Key Task 4.1 – Input content to international and domestic marketing campaigns (Discover Ireland)
	→	Key Task 4.2 – Develop engaging digital content championing modern Irish cuisine and the wide range of food experiences available
	→	Key Task 4.3 – Provide marketing advice and promotional opportunities for the development of new, or enhancement of existing food experiences

		Key Tasks	
<p>Activity 5</p> <p>Develop a practical model to enable operators to deliver food experiences</p>	→	Key Task 5.1 – Develop a food experience delivery model	
		Key Task 5.2 – Develop and deliver resources and toolkit for use by operators to deliver quality food experiences	
		Key Task 5.3 – Develop and implement a communication plan around the food experience model and tools available aimed across the food tourism landscape	
<p>Activity 6</p> <p>Oversee the evolution of the Food Tourism Development Network</p>	→	Key Task 6.1 – Manage and nurture the network and ensure continued exposure to best practice and evolving trends	
		Key Task 6.2 – Expand the function and numbers of the network to ensure the ambassadors encourage operators to continuously innovate and improve	
		Key Task 6.3 – Leverage opportunities for exposure by representing Ireland domestically and internationally	
<p>Activity 7</p> <p>Influence, stimulate and cultivate the development of innovative food experiences</p>	→	Key Task 7.1 – Further develop the food series concept and animation of food trails	
		Key Task 7.2 – Encourage activities and events to celebrate food heritage and nurture our blossoming food culture	
		Key Task 7.3 – Encourage development of initiatives which will appeal to key markets, segments and areas of potential growth	
<p>Activity 8</p> <p>Enable development of visitor ready food experiences</p>	→	Key Task 8.1 – Develop online resources and tools to enable visitor ready experiences	
		Key Task 8.2 – Provide best practice guides and case studies around visitor ready experience development	
		Key Task 8.3 – Provide advice and mentoring to facilitate the development of new and innovative food experiences	



Key Tasks	
<p>Activity 9</p> <p>Assist and enhance quality and standards in delivering world-class experiences</p>	<p>→ Key Task 9.1 – Engage with providers and operators to develop a quality assurance model, with an emphasis on the visitor experience and customer service elements, which would be applicable across all tourism businesses</p>
	<p>→ Key Task 9.2 – Provide assistance to enhance and maintain required quality and standards, both legislative and desired, through targeted interventions and guidance</p>
<p>Activity 10</p> <p>Advocate for the future-proofing of tourism and hospitality skills and capabilities</p>	<p>→ Key Task 10.1 – Liaise with education providers to influence tourism and hospitality education policy</p>
	<p>→ Key Task 10.2 – Seek to involve food tourism operators in curriculum development and course design</p>

4.6 Monitoring Progress and Impact

To ensure that both implementation and impact are continuously assessed over the lifetime of these plans, a range of performance indicators will be used, to include:

	KPIs Used to Monitor Progress
Thought Leadership	<ul style="list-style-type: none"> • Positive trends achieved in consumer feedback from the Holiday Maker Survey • Number and reach of industry-focused studies prepared • Number of benchmarking visits conducted and initiatives developed in Ireland as a result • Number of industry forums and events held to disseminate best practices • Number of visits/speaking engagements by international experts
Enhancing Food Experiences	<ul style="list-style-type: none"> • Food tourism narrative developed and adopted by industry operators • Communication plan devised and implemented • Number of new/enhanced food trails, festivals and events celebrating Irish food heritage and culture • Food experience delivery model developed and appropriate support resources prepared • Number of meetings held with key stakeholders per annum and agreed actions resulting from them
Championing Irish Food Experiences	<ul style="list-style-type: none"> • EAV of food experience promotions/campaigns • Number and impact of new digital resources introduced • Increased number of ambassadors and exposure gained by them • International exposure gained for Irish food experiences
Capacity Building	<ul style="list-style-type: none"> • Number and reach of food tourism models, resources and toolkits • Number of individuals and businesses impacted by direct and online supports • Number of tourism and hospitality training and development programmes and initiatives which are fit for purpose



4.7 Conclusion

The vision, objectives, themes and activities presented here are designed to meet the range of challenges facing Irish food experiences which were identified as part of the research and analysis undertaken. Moreover, they respond directly to many of the proposals and suggestions made by the Food Ambassadors during consultations with them; and are also reflective of wider influences such as the marketing of Ireland as a destination, Fáilte Ireland's strategy, and the needs of consumers. As such these plans, if supported and contributed to by key industry stakeholders, have the potential to make a significant impact on the continued development of food experiences in Ireland in the coming years.

In some respects, based on the activity plan outlined here, Fáilte Ireland is seeking to 'get out of the way' by enabling motivated stakeholders to do what they do best, namely to develop and deliver memorable food experiences. Yet, the supportive environment created by the combined outcomes from the proposed intervention model in the coming years can serve to reassure those stakeholders that:

- They are planning and operating on the basis of solid research and insights and in line with national tourism strategy;
- There is an ongoing national effort to raise the awareness of Irish food experiences generally, which is ultimately beneficial for all operators;
- There are practical tools and resources available to guide them operationally;
- Existing employees, and newcomers to the industry, have the skills and knowledge required to succeed.



Appendix 1 – Food Tourism Development Network – Members

Fáilte Ireland Food Ambassadors

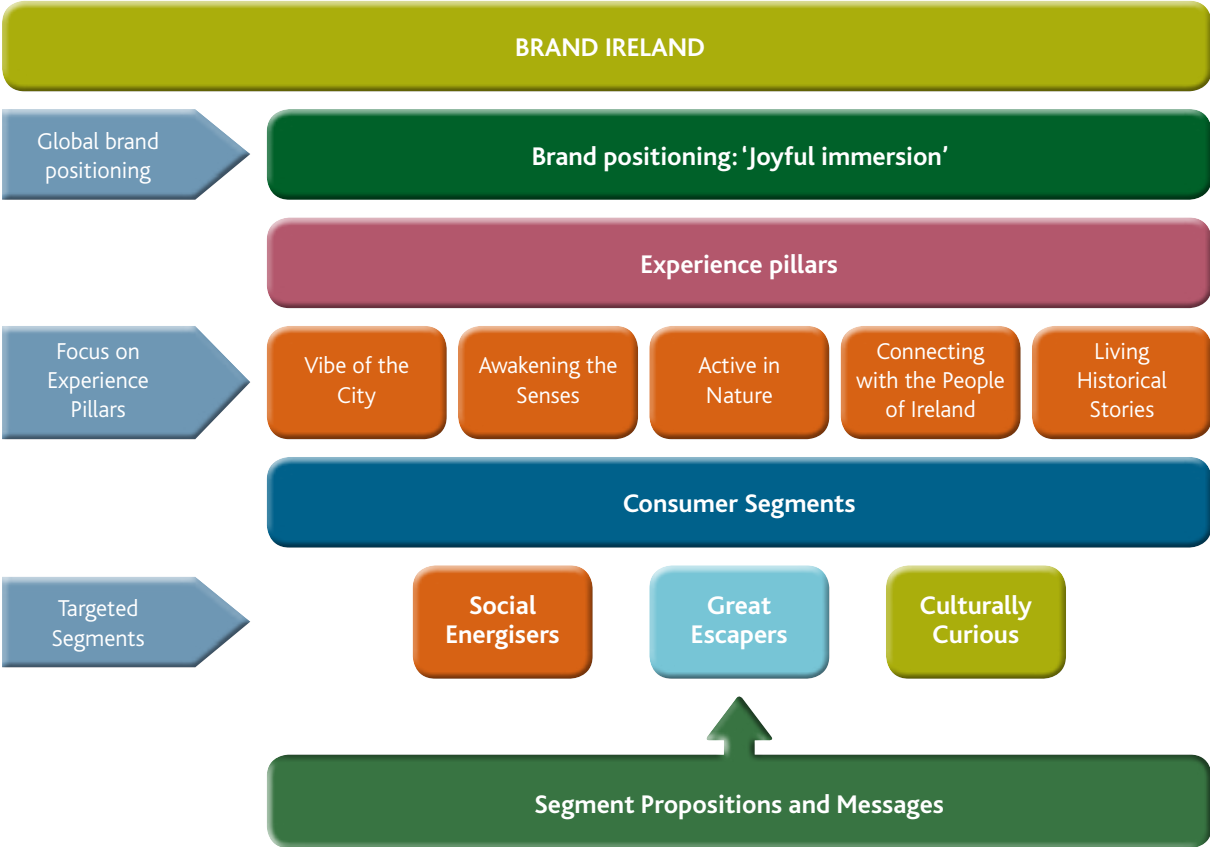
Anthony Creswell	Ummera Smokehouse
Benoit Lorge	Lorge Chocolatier
Brid Torrades	Café Osta/So Sligo food festival
Colin Jephson	Ardkeen Quality Food Store
Deborah Evers	Clareville House Kitchen Garden
Donal Doherty	Harry's Restaurant
Fergus O'Halloran	The Twelve Hotel
Hugh O'Donnell	Kitty Kellys & Hughies 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

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"> • Young – 15 to 34 – and like to holiday in groups or as couples. • A good example would be a group of 28-year-olds on a long weekend in Dublin or Belfast. • They're friends or colleagues, looking for a cool, exciting trip somewhere new and vibrant. 	<ul style="list-style-type: none"> • Social Energisers really like having a laugh and sharing the adventure with their friends. • They love new experiences and exploring new places – the more out-of-the-ordinary, the more exciting, the better. • 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. • 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. • Social Energisers will go for something unusual as long as it has the 'wow' factor they're looking for.
Culturally Curious	<ul style="list-style-type: none"> • The Culturally Curious are older – most are over 45 and more than a quarter are over 65. • They travel as couples or on their own. If they had children, they have grown up or have left home. • Typical Culturally Curious travellers would be 55 years old, taking a holiday with their partner. • They are out to broaden their minds and expand their experience by exploring new landscapes, history and culture. • They are curious about everything and are delighted to discover the world for themselves once again. 	<ul style="list-style-type: none"> • They're interested in all that a place has to offer and they want it to be authentic. • 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. • 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. • 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. • 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.

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

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



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