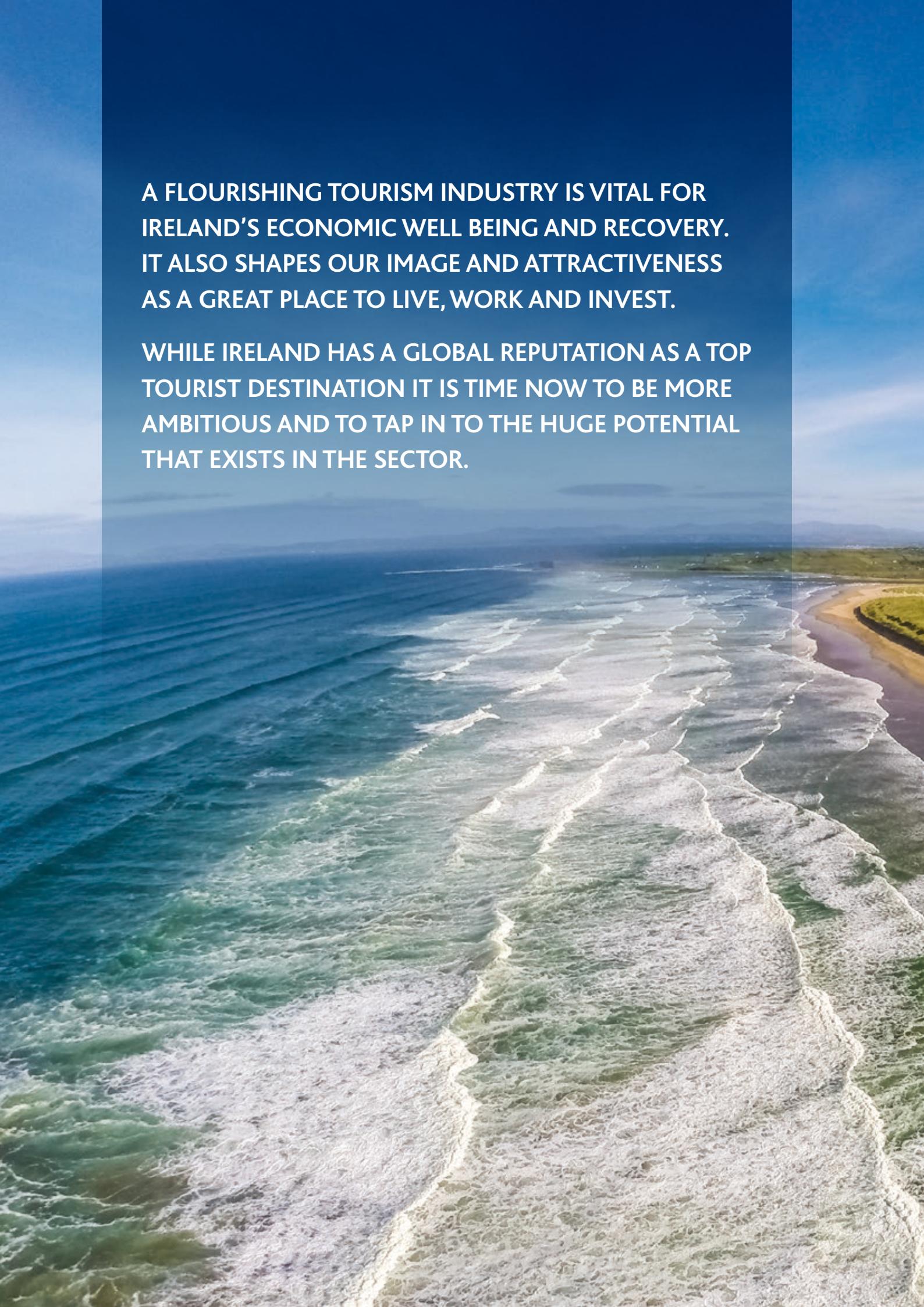


# TOURISM DEVELOPMENT & INNOVATION

A STRATEGY FOR INVESTMENT 2016-2022





A FLOURISHING TOURISM INDUSTRY IS VITAL FOR IRELAND'S ECONOMIC WELL BEING AND RECOVERY. IT ALSO SHAPES OUR IMAGE AND ATTRACTIVENESS AS A GREAT PLACE TO LIVE, WORK AND INVEST.

WHILE IRELAND HAS A GLOBAL REPUTATION AS A TOP TOURIST DESTINATION IT IS TIME NOW TO BE MORE AMBITIOUS AND TO TAP IN TO THE HUGE POTENTIAL THAT EXISTS IN THE SECTOR.

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# Section 1: Introduction

## 1.1 Introduction

A flourishing tourism industry is vital for Ireland's economic well being and recovery. It also shapes our image and attractiveness as a great place to live, work and invest.

While Ireland has a global reputation as a top tourist destination it is time now to be more ambitious and to tap into the huge potential that exists in the sector. We are unrivalled, after all, when it comes to what we have to offer: breath-taking natural beauty; rich heritage; cool culture; awesome adventure activities; world class music; the famous Irish pub and wholesome, untainted artisan food.

Ireland's tourism tentacles reach into every village, town and city, employing in the region of 205,000 people, or 11 per cent of the working population. In total the sector contributes over €6 billion to the economy, and accounts for 4 per cent of our GNP.

Any future tourism growth in Ireland will be hard won and the key will be innovation, adding value and strengthening the appeal of Ireland in international markets.

To stimulate innovation and improve international competitiveness, Fáilte Ireland has launched a significant new Tourism Development and Innovation Fund which will be the main source of funding in the sector over the next five years.

This exciting Strategy sets out the framework and mechanisms for delivery of investment to cities, towns, villages, communities and businesses across the country. It identifies priorities to support innovation in the sector to retain and grow our competitiveness in the marketplace. Its ultimate aim is to strengthen the appeal of Ireland for international visitors.

The objectives of this strategy are framed here within the internationally recognised VICE model. This identifies sustainable tourism as the interaction between Visitors, the Industry that provides services to them, the Community and culture that hosts them and their collective impact on and response to the Environment where it all takes place.

### Strategic Objectives:

- ▶ To successfully and consistently deliver a world class visitor experience;
- ▶ To support a tourism sector that is profitable and achieves sustainable levels of growth and delivers jobs;
- ▶ To facilitate communities to play an enhanced role in developing tourism in their locality, thereby strengthening and enriching local communities; and
- ▶ To recognise, value and enhance Ireland's natural environment as the cornerstone of Irish tourism.

## 1.2 Our Ambition

This strategy has been formulated in the context of the Government's policy framework and longer-term objectives for the tourism sector. The priorities identified here are designed to support that policy framework and to achieve progress by:

- ▶ Significantly growing foreign earnings from international business and leisure visitors to Ireland.
- ▶ Growing and sustaining tourism employment.
- ▶ Increasing the economic contribution of tourism across local communities.
- ▶ Building capacity of the tourism sector to compete more successfully internationally and to become more self-sustaining.
- ▶ Ensuring that the contribution of tourism to economic growth and regional development is fully recognised and understood.



### Growth Metrics

	2014	2017	2025
Foreign Earnings	€3.6 billion	€4.2 billion	€5.0 billion
Tourism Employment	205,000	230,000	250,000
Visitor Numbers	7.6 million	8.2 million	10 million

## 1.3 Overall Approach

A new approach to investment in tourism in Ireland, putting the consumer at the centre of all tourism development, strategies and plans are the cornerstone of this new strategy. There will be a shift in focus from supply to a more consumer driven and insights led approach. What do we want to be known for? What do we need to do to achieve this?

In recent years there has been major emphasis on building brand architecture for the delivery of tourism, and on having a better understanding of the motivations of our consumers through the development of a consumer segmentation model.

It is our intention that this strategy will fund truly innovative projects that will transform visitor experiences for Ireland's target markets, especially for international visitors. The strategy is in itself innovative, providing an investment framework that is not too prescriptive, and that is flexible enough to stimulate and support innovation in the sector.

**The strategy will be outcome based and will identify the types of projects to invest in that will achieve these outcomes, rather than specific projects or locations for investment.**



## Stimulating Innovation

In order to foster innovation we recognise the need to have a common understanding as to what innovation actually means – and to provide on-going supports to applicants throughout the lifetime of the investment fund.

Put simply, innovation is any change in how tourism is developed and delivered that adds value.

One of the main findings of the consultation with key stakeholders on the development of this strategy is the need for Fáilte Ireland to support partners and applicants throughout the application process to stimulate innovative and creative projects for funding. This will be done by:

- ▶ Providing information and technical advice and supports on business models, case studies and organising benchmarking trips etc. when required or appropriate.
- ▶ Providing funding for technical assistance required to bring them through the design and development stages of the project.
- ▶ Hosting innovation workshops and webinars for partners and applicants to stimulate ideas and discussion.
- ▶ Providing market and consumer insights and trends to ensure to applicants have up to date information required to ensure projects are evidence based and market driven.

The fund is about step change and that might involve developing brand new concepts or taking a current product or experience and adding a new twist. It might involve changes behind the scenes that visitors may not see but are part of creating a sustainable attraction, e.g. creative delivery or funding structures or innovative ways for partners to work together.

This strategy has been prepared by Fáilte Ireland and informed by:

- ▶ a review of the previous Tourism Capital Investment Programme 2007-2013;
- ▶ extensive consumer insights and market trends;
- ▶ consultation with national, tourism and trade stakeholders; and
- ▶ review of relevant existing plans and strategies.

Consultation has been a key aspect of the development of this strategy and this has been undertaken with consultees both within and outside Ireland including trade, journalists, tour operators, Local Authorities, and strategic partners. This has been carried out through workshops, one-on-one meetings, presentations, telephone interviews, written submissions and more, to ensure as many insights and perspectives on what this strategy could and should support have been captured.

Appendix 1 pulls together the outputs of the wider consultation undertaken with a diverse range of stakeholders.

## 1.4 Rationale for Investment

The rationale for investment and preparation of this strategy draws heavily on the Tourism Policy Statement '*People, Place and Policy Growing Tourism to 2025*' which sets out clear and ambitious targets for the development of Irish tourism. The document recognises from previous investment the '*contribution that capital investment in tourism can make to increasing visitor numbers in the medium term and to sustainable economic recovery*' and indicates the Government's intention in 2016 to fund a '*further programme to support capital investment in tourism*'.

This policy '*endorses an evidence-based approach to maximising return on marketing investment, as reflected in the brand architecture and consumer segmentation model*', and states that '*future support for capital investment in tourism will be focused on projects that fit within the brand architecture and consumer segmentation framework*'.

In September 2015 the Department for Public Expenditure and Reform (DPER) launched the Government's Capital Plan for investment '*Building on Recovery: Infrastructure and Capital Plan Investment 2016-2022*'. The plan indicates an intended investment of €125,705,000 in tourism over this six year period <http://www.merrionstreet.ie/en/ImageLibrary/20150929CapPlan.pdf>.

Fáilte Ireland has now prepared this strategy document to provide a framework for investment of the funds outlined in the DPER Plan.

## 1.5 Scope

The investment fund is intended to be administered by Fáilte Ireland to provide support to tourism capital investment projects and initiatives by both the public and private sectors. However, experience from the administration of the Tourism Capital Investment Programme 2007-2013 has shown that alignment of capital investment support with investment in human capital support such as training and capacity building within business and community networks is necessary to ensure that the full intended impact of any capital funding is achieved. While this current fund may have limitations in how it might invest in these non-capital elements, it would be important to align the priorities of national and local development agencies, such as the Local Authorities, the Leader Companies and Údarás na Gaeltachta, that can make investments in these non-capital areas, to the priorities identified in this strategy insofar as is possible.

To this end, Fáilte Ireland will work closely with the local development authorities and agencies to ensure that priorities are aligned around the key tourism brand propositions which can make a real difference for Irish tourism. For its own part, Fáilte Ireland will examine how it can align investment from this fund with the human capital element of other funding programmes as appropriate.

In addition to the types of capital development projects that would be expected from this fund, investment will also be made in assets which may have a shorter life-span but which are very important in terms of improving the visitor experience. These include animation and interpretation projects, digital assets, and the provision of equipment.

A certain proportion of the fund will also be invested in assessing the feasibility of proposed initiatives and in the technical assistance required to bring them through the planning and development process.

A number of delivery mechanisms have been identified in Section 4 of this document, ranging from grant schemes (both large and small), partnership projects and the funding of signature experience plans. It should be noted that focussed grant schemes in particular will be part of a competitive process, where those projects which best meet the priority outcomes identified in that call will be given priority for funding.

Finally, although this strategy provides a framework for investment over the next five years, in order to ensure that new trends and insights can be incorporated into the investment fund and that exciting and innovative projects can be supported, a mid way review will be undertaken in 2018 to identify what is working best, any changes which need to be made and to refresh the strategy as required.



# Section 2: Strategy Policy Context

## 2.1 Overview

The tourism sector's best prospects for growth lie in generating increased levels of overseas revenue. The focus of the Government's 2025 Tourism Policy is to increase the economic contribution of tourism to the Irish economy, by increasing the value of tourism service exports.

The promotion of Ireland as a tourism destination in overseas markets has additional significance beyond its direct purpose of additional visitor numbers and revenue. The positive images of Ireland that are highlighted in tourism marketing, such as our high quality natural environment, and friendly and welcoming people, also supports the Government's activities in other areas of economic development, such as the promotion of foreign direct investment into Ireland. The continued promotion of Ireland as a tourism destination in overseas markets is also significant in terms of raising public awareness and perception of Ireland.

To maintain and grow Ireland's positive image and to achieve tourism policy objectives, Ireland must focus on '*cutting through*' the '*noise*' of other destinations in the global destination marketing arena. We must provide experiences that will appeal to potential visitors, satisfy consumer segment needs and force them to reappraise Ireland as a destination.

In order to achieve the 2025 visitor revenue target, tourism plans will continue to be formulated strictly on the basis of evidence of regions and consumer segments that have the strongest prospects for revenue growth in the medium to long term.

In terms of the tourism offering, there are two key responses required:

1. The first is to strengthen Brand Ireland by building propositions of scale capable of achieving international cut-through (i.e. standing out among the large supply of alternative tourist destinations that are available internationally) and securing consumer attention.
2. The second is to re-position Ireland's tourism asset base so that it directly mirrors the interests and requirements of the consumers identified in the most promising market segments.

Maintaining a clear focus on the interests of the international visitor and on strengthening the appeal of Ireland in international markets is the ultimate aim of this investment strategy. In order to achieve the alignment of tourism investment with the needs of the key consumer segments, this investment fund will focus on projects that fit within the brand architecture and consumer segmentation framework.

The domestic tourism market sustains a level of investment in tourism product that is of considerable benefit to Ireland's attractiveness as a destination. This domestic demand also maintains sector revenue during non-peak periods, however, the small size of the domestic market, and the high existing level of domestic tourism consumption by Irish residents, limits the potential for further growth from domestic demand.

## 2.2 Consumer Segmentation

The four big international markets for Ireland are the USA, Great Britain, France and Germany. Despite the growth in emerging markets these four are forecast to remain our strongest markets for some years to come.

In a growing global hyper-competitive marketplace, where annually over 1 billion tourists travel internationally, it's imperative that Ireland continues to offer stand out, world-class experiences for international visitors. Ireland must be promoted as a country which is a perfect fit, with something to appeal to all interests, encouraging visitors to not just contemplate coming to Ireland but to actually come.

Rather than taking a broad stroke approach, Fáilte Ireland has adopted a more strategic focus by segmenting the market and concentrating tourism development strategies on the best opportunities for visitor conversion, satisfaction and increased length of stay.

Segmenting visitors is not new. Segmenting by demographics and geography provides a quick and easy method of approaching the tourism industry; however it has its limitations and is only part of the puzzle. For example not all 25-34 year olds from Britain are looking for the same things from their holiday or short break.

Fáilte Ireland's development strategies, plans and engagement with industry stakeholders (across its major propositions – Wild Atlantic Way, Ireland's Ancient East and Dublin) is informed by a consumer segmentation model which is based on a typology of holiday motivations (sightseeing, relaxing and so forth) but is also supported with demographic and geographic descriptors.

Motivation plays a major role in determining tourist's behaviour. It determines not only if the consumer will engage in a tourism activity or not, but also when, where and what type of tourism they will pursue.

This segmentation model was developed based on a comprehensive review of Ireland's core international markets Great Britain, USA, France and Germany. The identification of segments highlighted that there are many common priorities across countries and that people are best differentiated by motivation rather than nationality (even so international travellers in each country have their own culture and some slight different emphases are appropriate when communicating the offer).

From the resulting global segmentation model, three segments in particular have been identified as Ireland's best prospects for growing tourism in its main overseas markets.

The three priority segments are:

- ▶ Social Energisers – seek vibrant city life in new and exciting destinations and are motivated by factors which Ireland, and Dublin in particular, is strong on. They are comparatively young visitors travelling as couples or part of adult groups.
- ▶ Culturally Curious – are out to broaden their minds, expand their experience by exploring new landscapes, history and culture and look to really understand the destinations that they visit. They are independent-minded and like getting off the beaten track. These are comparatively older visitors, who typically travel as a couple or on their own.
- ▶ Great Escapers – They travel very much as a close-knit group and are on holiday to take time out, to get physical with nature where they can escape their hectic lives and focus on each other. Consequently, they are less interested in meeting others. These are comparatively younger visitors who are often couples with children.

In accordance with best practice a review is currently underway to validate the segments, further our understanding of the motivations and behaviours and to future proof the model to feed into Fáilte Ireland's strategies.



## 2.3 Brand Architecture

### Brand Ireland

There is significant research which shows that certain experiences offer the greatest appeal to international holidaymakers. These are identified below as the five pillars of Tourism Brand Ireland, our unique international tourism identity.

These pillars or experience components are identified as having the potential to set Ireland apart from its competitors.

- ▶ 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 – immersing themselves 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

Fáilte Ireland has developed a number of core propositions capable of delivering on these experiential pillars for target consumer segments and markets. It should be noted that whilst all of the propositions are relatively new, some, such as the Wild Atlantic Way, are more established than others and therefore all are at different stages of development.

### Wild Atlantic Way

The Wild Atlantic Way is Ireland's first long-distance touring route, stretching along the spectacular Atlantic coast from Donegal to West Cork. It provides a breath-taking journey of discovery within six regions. The allocation of €8m towards the project in Budget 2014 allowed for the provision of signage and the start of the enhancement of 181 discovery points, including 15 signature discovery points, along its epic 2,500km route.

#### The Brand Proposition

*"Where the wild Irish land and seascapes meet – the world's longest defined coastal touring route"*

The Wild Atlantic Way destination brand was developed with a specific objective to be a unifying proposition for the West Coast of Ireland. People want to experience an off the beaten track experience that genuinely immerses them in multiple ways so that they feel stimulated, energised and uplifted.

Three overarching themes have been identified to guide the future development of the Wild Atlantic Way:

- ▶ Spirit of Adventure (Adventure);
- ▶ Life Shaped by the Atlantic (Culture), and
- ▶ Where Land and Sea Collide (Landscape and Seascapes)



#### Strategic objectives of the Wild Atlantic Way Proposition

The strategic objectives behind the development of The Wild Atlantic Way initiative are:

1. To generate and sustain economic opportunity and economic development through tourism in the West of Ireland.
2. To re-package the Atlantic seaboard as a destination to overseas (and domestic) visitors and establish a destination brand and touring route product of sufficient scale and singularity to enable successful marketing overseas;



3. To drive an increase in visitor numbers, dwell time, spend and satisfaction within the destinations;
4. To drive an increase in visitor numbers to less visited areas and encourage better visitor management in areas that are currently achieving greater visitor numbers;
5. To be the catalyst for an increase in collaboration between destinations, industry providers and groups along the west coast;
6. To improve the linkages between and add value to a range of attractions and activities (& experiences);
7. To reinforce the particular strengths and characteristics of the key destinations along the route (such as the Ring of Kerry and Connemara) while at the same time offering the visitor one overarching compelling reason to visit;
8. To ensure that the Wild Atlantic Way is delivered in accordance with the principles of sustainable tourism, ensuring that economic, social and environmental benefits are delivered in a balanced way.

## Ireland's Ancient East

The Ireland's Ancient East initiative is designed to allow visitors peel back the layers of time and to go off the beaten track to experience thousands of years of history. Covering the South and East and part of the Midlands, it focuses on the wealth of cultural and heritage attractions in the area.

### Brand Proposition

*"Ireland's Ancient East offers a personal experience of 5,000 years of Europe's history. Your journey of discovery in this relaxing, off the beaten track, lush beautiful landscape, that attracted warring settlers for millennia, will be made illuminating by stories from the best story tellers in the world"*

The overarching theme for Ireland's Ancient East focuses on:

- ▶ 5000 years of European history, lush green landscapes and stories told by the best storytellers in the world.

### Strategic objectives of the Ireland's Ancient East Proposition

The key strategic objectives of the Ireland's Ancient East initiative are:

1. To drive growth in international visitor numbers, tourism revenue and associated tourism employment in the regions which currently underperform in these areas.
2. To move Ireland's east and south from a transit and day tripping zone to a destination which attracts international overnight visitors.
3. To develop a world class visitor experience, which delivers fully on the brand promise.
4. To differentiate the Ireland's East and South destination, within the international tourism marketplace, on the basis of the quality of its heritage experiences and a clear and memorable narrative, which links all experiences within it.
5. To disperse visitor traffic by encouraging the exploration of both the well-known attractions (in some cases congested) and lesser known sites and experiences (hidden gems).
6. To ensure Ireland's Ancient East is delivered in accordance with the principles of sustainable tourism, ensuring that economic, social and environmental benefits are delivered in a balanced way.



## Dublin

### Brand Proposition

This new brand seeks to reflect Dublin's unique position as a vibrant, cool and hip capital city bursting with a variety of surprising experiences – with sea and mountains of its doorstep. The tagline 'Dublin – A breath of Fresh Air' has been developed to communicate this message.

The objective for Dublin is to enhance the overall visitor experience and uniquely position the city and surrounding bay and mountains by offering memorable experiences via four key market-focused themes:

- ▶ City of Wit and Words;
- ▶ Living Bay;
- ▶ Dublin Stories, Hidden and Untold; and
- ▶ Extraordinary Days and Happening Nights.

### Strategic Objectives of Dublin Proposition

1. To drive growth in international visitor numbers and tourism revenue and tourism related employment in the capital.
2. To develop Dublin's long term appeal to guarantee that, despite the macro business environment, Dublin will continue to attract international visitors and compete with other city destinations overseas.
3. To reposition Dublin from a city that is defined mainly as an alcohol fuelled party city to a '*must visit*' destination with an evolving breadth and depth of stimulating experiences to see and do.
4. To establish and improve awareness of the new Dublin brand and proposition to Dubliners and overseas markets.
5. To engage the wider community and all who love Dublin to get behind the new brand and messaging.
6. To better incorporate the sea and mountains as key elements of the Dublin proposition helping visitors unearth experiences outside the top ten and encourage visitor flow outside the city centre.
7. To develop compelling and stimulating visitor experiences which are attractive to our target market segments.
8. To embrace the arts and cultural interests in the city who would not ordinarily see themselves in a tourism arena.
9. To ensure the Dublin proposition is delivered in accordance with the principles of sustainable tourism, ensuring that economic, social and environmental benefits are delivered in a balanced way.

## Lakelands

As previously mentioned while all tourism propositions are relatively new, some are more established than others. The Lakelands as a stand-alone proposition is currently being reviewed to determine the best fit within Ireland's brand architecture. The findings of the review when completed will be incorporated in to this Tourism Development and Innovation Strategy.

## 2.4 Developing and Improving Our Visitor Experiences

The visitor experience is king and it is now widely acknowledged that it is no longer sufficient to sell a tourism product – a memorable experience must also be provided. It is the job of the tourism sector to create the conditions for these experiences to happen consistently and to a very high quality.

In order to achieve this it is important to understand the four components that almost every tourism experience can be broken down into:

1. Product – must be authentic
2. Service – must be high quality
3. Story – must be distinctive
4. Narration – must have unique character

These components have to be delivered seamlessly and to a high quality in order to create a memorable experience for the visitor.

Fáilte Ireland has devised an '*experience development framework*' (for more detail refer to Appendix 2) which will assist in planning and developing memorable tourism experiences across the key brand propositions: Dublin, Wild Atlantic Way and Ireland's Ancient East. A number of themes have been identified under each of these brand propositions which are intended to guide development.

The framework is based on the assumption that not all tourism experiences fulfil the same function.

The different "*Experiences*"

- ▶ Signature Experiences – These are motivational, a '*must do*' within an area and ones that will draw visitors and have the ability to generate at least one overnight. They represent the essence of the brand experience proposition. They usually have one or two key attractions at their heart which are called '*hero products*'.
- ▶ Supporting Experiences – While not being motivational in their own right, they provide visitors with a wide range of choices of things to see and do in an area and will serve to retain visitors in an area for longer. They serve to keep people in an area once they have visited and are expected to also deliver on the particular brand promise.
- ▶ Ancillary Experiences – These are a range of other experiences which visitors expect any high quality destination to have, including restaurants, pubs, and accommodation.

A simple pyramid as outlined in Appendix 2 of this document sets out how these various types of experiences relate to one another to deliver on the brand promise of the key proposition. This is based on a review of best practice in developing tourism experiences internationally and is designed to provide an overall strategic framework to guide the development of great tourism experiences in Ireland around the key brand propositions.

## Section 3: Trends and Insights

While it is important to put our knowledge and understanding of what consumers want to the forefront of all planning it is also important to keep focused on emerging and evolving global consumer behaviour trends.

This involves more than tracking what people buy and how much they spend. We need to also look at how a potential driver of change has developed over time, and how it is likely to develop in the future.

Trends vary in their breadth of application. For example generational/demographic trends (Gen X, Gen Y/ Millennials), and digital/technology trends are broadly applicable and provide more of a contextual backdrop (e.g. mobile technology and the use of smartphones in travel inspiration before planning – e.g. while in spare moments, while commuting, while watching TV).

Narrower trends in relation to emerging behaviour around a specific type of consumption allow for a richer picture of what the future will look like.

Because there are often several factors that result in a consumer to make a particular decision trends should be combined and layered to provide a greater insight into the potential for a development.

It is intended that this strategy will be flexible enough to incorporate future insights and trends, and to encourage and fund innovative and creative projects which support the delivery of quality visitor experiences.

Priorities for this capital investment fund have been identified through a variety of methods. Fáilte Ireland has taken lessons from its previous Tourism Capital Investment Programme 2017-2013. It has been informed by the kinds of experiences that our visitors are looking for coming to Ireland; it has consulted widely with stakeholders in and outside of Ireland; it has drawn on relevant international tourism trends and insights, and it has examined other tourism capital investment programmes from around the world.





## Section 4: Priorities for Investment

This strategy seeks to identify the areas of investment that we need to focus on over the next five years that will deliver sustainable growth in the Irish tourism sector resulting in higher revenue and more jobs.

This strategy is intended as a broad framework for investment in the tourism sector. It is not intended to be a list of specific projects, nor is it intended to be too prescriptive and it must be flexible enough to stimulate and support innovation in the sector.

Priorities for investment in this strategy have been identified below as '*desired outcomes*' for the core brand propositions. These outcomes are expressed as '*the difference we want to make*' for each of the brand propositions. The strategy seeks to encourage, incentivise and support specific experience development priorities identified for each brand proposition to ensure that the experience promised by the brand is matched by the visitor experience on the ground.

### 4.1 Desired Outcomes

There are four strategic outcomes which will be sought across all of the propositions as follows:

1. Increasing the number of overnights spent by overseas visitors and increasing their spend
2. Creating employment opportunities
3. Leveraging public or private sector investment into the tourism experience
4. Stimulating international awareness and demand



There are also a number of specific outcomes which will be sought and prioritised (albeit to varying degrees and in line with the specific brand proposition) as follows:

- 1. Orientation and Navigation:** Research shows that visitors love to be able to explore Ireland independently. Fáilte Ireland will help them by ensuring they can easily find their ultimate destination and discover hidden gems along the way through digital and conventional fixed and mobile media.
- 2. Distribution of traffic and spend:** While a small number of visitor attractions are at capacity, the vast majority in Ireland can accommodate and would benefit from increased visitor numbers. This investment strategy will support projects which will increase the number of visitors especially to the many wonderful but less well known heritage sites around the country, particularly throughout Ireland's Ancient East.
- 3. Engaging with the Outdoors**
  - 3.1 Access to the landscape:** the various brand propositions promise different but engaging and memorable experiences of the landscape and countryside/coast of Ireland. For the Wild Atlantic Way the coastline is the focus, whereas with Ireland's Ancient East the lush green landscape is at the core of the brand.

Through this investment strategy Fáilte Ireland will support, directly or indirectly, projects which sustainably create or improve access to, or enhance the visitor experience of the brand propositions. This may include development or enhancement of outdoor amenity infrastructure such as pathways to improve accessibility and manage erosion, wildlife viewing points, coastal paths etc. Alongside this investment Fáilte Ireland will encourage local authorities and project promoters to adopt international best practice in providing sustainable and sensitive access to the landscape and the coast.
  - 3.2 Improving the visitor experience of State lands:** Where appropriate, and only ever in partnership with the state body concerned, Fáilte Ireland will support projects which seek to optimise the visitor experience of state owned lands such as national parks, nature reserves and forest parks, through delivery of quality outdoor activity infrastructure and essential ancillary facilities.
  - 3.3 Opportunities for outdoor activity businesses:** the growth of a skilled and knowledgeable cluster of outdoor activity businesses is one way to provide for those visitors who prefer to be active consumers of the natural landscape.

Through this investment strategy, Fáilte Ireland will support projects which provide fixed or shared infrastructure which facilitates/encourages/creates opportunities for the business of outdoor adventure providers (this may include water access points, surfboard/canoe lockups, shower blocks, jetties etc.).

## 4 Engaging with Heritage

**4.1 Increased capacity at iconic attractions:** A number of iconic attractions around the country (and most notably within Ireland's Ancient East) are already at capacity during the busier months of the year including Newgrange, The Rock of Cashel, Glenveagh and Connemara National Parks etc. It will be important to provide extra capacity where possible or to deliver other solutions where daily visitor numbers cannot be increased (e.g. Newgrange).

Solutions will vary and may include improved visitor facilities and increased visitor awareness of lesser known attractions, improved off-site interpretive centres, and development of pre-booking facilities to avoid disappointment.

**4.2 Enable access to heritage and culture:** A significant number of existing visitor attractions are constrained due to the lack of essential ancillary facilities such as coach parking, tea rooms and toilets (an essential for touring visitors). Enabling sustainable access to heritage and culture will be a key outcome of this investment strategy.

**4.3 Conservation and Sustainability:** It is acknowledged that while the built and natural heritage are core assets in all of the brand propositions, many heritage sites across the country are at risk and in need of ongoing maintenance.

Fáilte Ireland will advocate for the necessary conservation of heritage assets and work with other national agencies on shared action planning in this area. In addition, Fáilte Ireland may support projects which facilitate access, visitor management and the appropriate generation of revenue to enable the sustainable opening of historic sites to visitors.

## 5 Improving Interpretation

**5.1 Interpretation and Storytelling:** Fáilte Ireland will support projects which seek to deliver the stories which underpin the various core propositions, in a manner which is coherent, informative and entertaining for visitors – and which enables the community to play a leading role in the telling of that story.

**5.2 Foreign language provision:** the improvement of foreign language provision at attractions and heritage sites will be key to the success of the brand propositions.

Fáilte Ireland will seek to support projects which deliver tangible and innovative ways of providing information to visitors in a foreign language, particularly for our priority markets.

**5.3 Animation:** Fáilte Ireland will, through various direct and indirect means, support projects which bring life and colour to the visitor experience of heritage sites and town centres. The focus will be on the support of;

- ▶ regular programmes of animation (re-enactments, performance and the arts) at historic attractions and in historic town centres, rather than on individual events.
- ▶ development of flexible outdoor event spaces in town centre public spaces which, over the longer term, greatly facilitate festivals and the ongoing animation of town centres.
- ▶ development of technology projects which bring heritage sites and the streets of towns and cities to life e.g. talking statues, furniture, art, etc.

**6 Innovation and Product Development:** The introduction of the various brand propositions must be a catalyst for the development of new tourism experiences in towns, villages, attractions and activities, and new opportunities within tourism.

Through this investment strategy Fáilte Ireland will seek to encourage the development of new experiences, and provide opportunities for creative and technology companies to engage with the visitor experience.



- 7 Capacity Building and Operational Sustainability:** The ongoing operational sustainability and success of funded projects after the development period will be a major emphasis in this investment strategy. Fáilte Ireland will endeavour to design funding processes to ensure that sustainable business models are in place and that funded projects are well staffed, that they continue to grow, change and refresh themselves long after initial funding.
- 8 Strengthen the role of Digital:** Technology is playing an ever increasing role in all stages of the visitor journey both before, during and after the visit. This Strategy will seek to support projects which improve content (imagery, stories etc) and capability (apps, websites etc) which ensures the sector operates to 'best in class' in the digital space, in order to facilitate the presentation and delivery of the visitor experience and ease of purchase.
- 9. Facilitating touring visitors:** While touring visitors staying in paid accommodation are the priority visitor, where appropriate Fáilte Ireland will seek to enhance the facilities available to touring visitors.

## 4.2 Delivery Mechanisms

It is proposed that there will be four principle mechanisms for allocating funding in accordance with the outcomes identified in the Investment Strategy: 1) Grant Schemes, 2) Strategic Partnerships, 3) Signature Experience Plans, and 4) Direct Investment.

Outcomes set for each of the experience brand propositions will be used to develop detailed clear, concise and transparent criteria across all delivery mechanisms.

As previously mentioned in Section 1.3 of this strategy Fáilte Ireland also recognises the need to support applicants and partners in the preparation of applications for funding. It is intended to do so by providing information and technical advice on business models, case studies etc.; learning journeys/benchmarking trips; feasibility and technical assistance and innovation workshops.

### 4.2.1 Grant Schemes

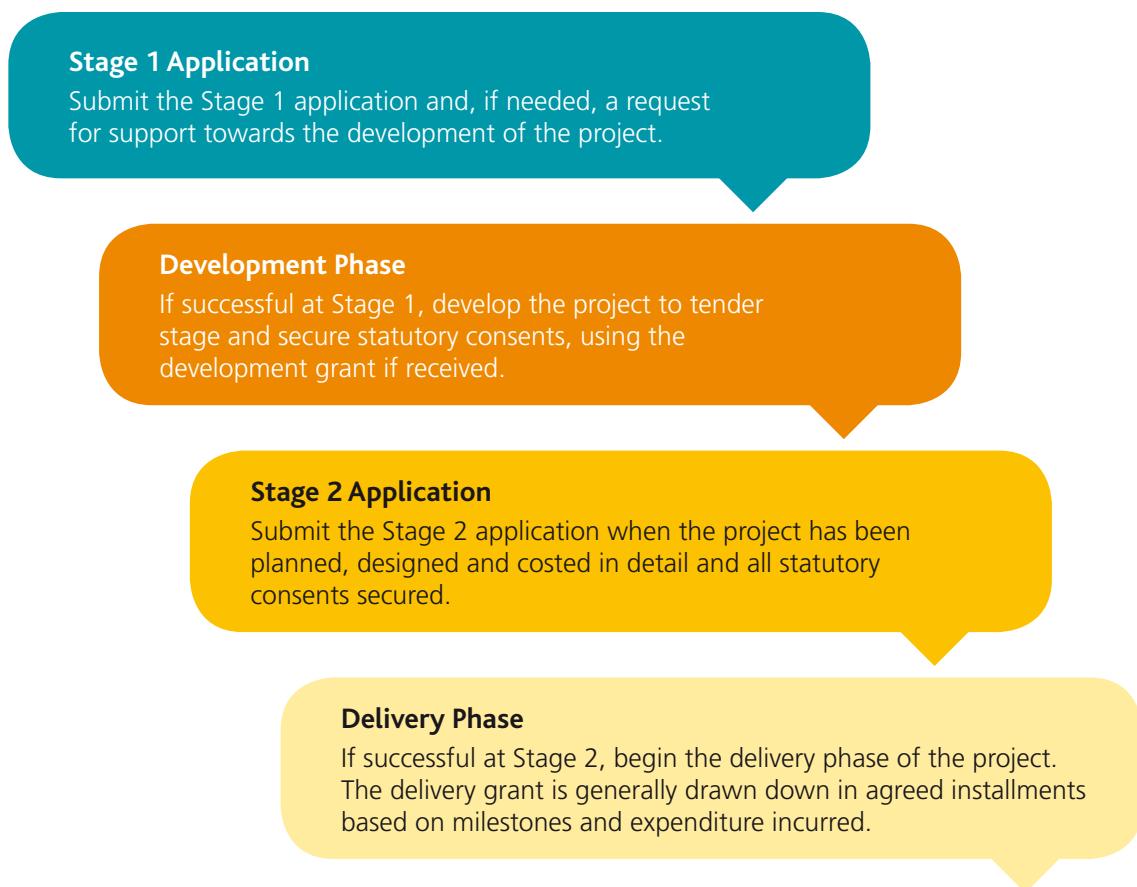
A number of focused, outcome based and competitive grant schemes which are aligned to the key experience brands will be developed. There will be a clear connection between the desired outcomes for each of the brand propositions which have been expressed in this document and the criteria that will be established for each grant scheme.

There will be large grant schemes (greater than €200,000) and small grant schemes (less than €200,000).



## Large Grant Schemes

For large scale projects (amounts greater than €200,000), a two-stage process will be introduced with a strategic decision taken in principle on whether to provide funding based on an initial expression of interest, accompanied where appropriate with developmental funding for mentoring, technical assistance, feasibility assessments etc., followed by a second stage detailed evaluation based on a detailed application for funding to implement the project. This process is illustrated in Figure 2 below.



**Figure 1:** Proposed application and evaluation process for large grants

## Small Grant Schemes

For small scale projects (grants less than €200,000), a series of focused, outcome based small grant schemes will be operated which will be particular to each Programme.

The recent Ireland's Ancient East Small Grants Scheme, which has a focus on animating heritage places and improving the quality of interpretation, is an example of this type of approach.

Each call for grants will be preceded by an innovation workshop hosted by Fáilte Ireland to which potential applicants will be invited. These workshops will stimulate ideas and discussion through presentations demonstrating innovation in projects and initiatives that are relevant to the particular grant scheme. Priority will be given to those which best meet the criteria and promise to deliver on the desired outcomes. Grant schemes may potentially in some instances be themed.

Detailed Operational Guidelines will be prepared for all grant schemes in advance of their launch.



#### **4.2.2 Strategic Partnerships**

A number of primary strategic partners (including but not limited to the following state and semi-state agencies) have been identified for the purpose of this investment strategy: Office of Public Works, National Parks and Wildlife Service, Coillte, National Transport Authority and Waterways Ireland. These strategic partners will deliver a joint plan with Fáilte Ireland to deliver on the outcomes and strategic objectives of the propositions. Fáilte Ireland will work with these bodies to identify investment priorities relating to their own properties which will contribute to the achievement of the outcomes of one or other of the experience brand propositions.

Fáilte Ireland is currently liaising with the OPW in the preparation of an investment programme for its sites and properties within the Ireland's Ancient East proposition area. Similarly, an experience development plan for the five National Parks and a number of nature reserves is currently being prepared with the NPWS, with a view to improving the visitor experience at these sites.

#### **4.2.3 Signature Experience Development Plans**

Developing and delivering Signature Experiences will involve a process of collaboration and consultation with our key stakeholders which will result in Signature Experience Development Plans. They will, inter alia, identify the '*hero products*' or core attractions for each Signature Experience, many of which may be in need of capital funding.

A specific targeted grant scheme may be developed for each of the Signature Experience Plans, depending on the nature of the plan and the scale of the capital requirement contained therein.

The mix of partnership programmes, plans and grant schemes, and indeed the type and range of grant schemes that will be devised, will be reviewed on an annual basis.

#### **4.2.4 Direct Investment**

There may be instances where an opportunity and/or gap in investment is identified by Fáilte Ireland which requires direct investment in, for example, digital, animation and storytelling, signage etc. Where this happens Fáilte Ireland may develop a programme to fill the gap for which applicants may apply directly for funding.

## APPENDICES

### Appendix 1 – Consultation Report

A copy of the Consultation Report to accompany this strategy can be downloaded on [www.failteireland.ie](http://www.failteireland.ie). This report pulls together the findings of the extensive consultation undertaken with a diverse number of stakeholders, and which were used to shape the development of this Strategy.



## Appendix 2 – Experience Development Framework Definitions



### Themes

The main function of the Themes is to guide the development process by focusing on key areas/elements of the proposition, bringing it to life. In addition they provide the creative steer for the identification of signature experiences.

### Signature Experiences

The Signature Experiences deliver on the brand proposition and serve as a motivator for international visitors. They can be story-based, thematic or geographical. Signature Experiences should:

- ▶ Be motivational for international visitors
- ▶ Be brought together a compelling story
- ▶ Be of scale (include more than one experience, and usually a combination of experiences)
- ▶ Have at least one '*hero product*' or '*must do*' at its heart
- ▶ Be capable of increasing dwell-time and/or driving economic benefit.

**Note:** A '*hero product*' is an authentic and iconic tourism product or experience that represents the essence of the Signature Experience. It is the '*must see or do*' element for visitors. There should be at least one "*hero product*" per Signature Experience, but there can be more than one.

### Supporting Experiences

Supporting Experiences are individual businesses that are also aligned to and deliver on the brand proposition. They '*stand up*' or bring the Signature Experience to life. Individually these businesses would generally not motivate the international visitor in their own right, but they are key to immersing the visitor in the overall signature experience.

### Ancillary Experiences

Ancillary considers the wider tourism offering that must also deliver a memorable and pleasurable experience. Examples include public realms, piers and the wider accommodation, food and service offering in the signature experience area.

In implementing this Framework, Fáilte Ireland commits itself to pursuing the principles of Responsible Tourism as set out in the Cape Town Declaration (2002) which seeks to minimise negative environmental and social impacts, while maximising the positive benefits.



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