Fáilte Ireland
National Tourism Development Authority

FOOD AND DRINK STRATEGY 2018 – 2023

FOOD TOURISM DEVELOPMENT

Statement of Strategy 2018 – 2023

EXECUTIVE SUMMARY

Ireland has made significant strides in recent years in strengthening the breadth and quality of its food and drink offering.

For its part, Fáilte Ireland, through its Food Strategy 2014-2016 has sought to shift the perception that Ireland is a producer of great ingredients to that of a nation with an authentic cuisine.

In large measure the previous strategy has been a success: Irish operators are better networked and mobilised and there has been a steady stream of innovative food and drink initiatives across the country. International research indicates the product/service development effort has worked – the reality of visitor's experience with Irish food now far exceeds their expectations prior to their arrival in the country *(see page 6)*.

Whilst perception of Irish food has improved, much work remains to be done in the years ahead. Equally, having established a strong nucleus of operators with a real passion for Irish ingredients and cuisine, we now need to accelerate our efforts to increase the probability of happening on a great Irish food experience by increasing the numbers of businesses engaged with creating an 'Irish food movement' – we want consumers to be able to encounter great food anywhere in the country and to be able to do so no matter what their budget.

Food and beverage consumption accounts for 35% of all international tourism revenues. As we seek to grow the value of Irish tourism over the next 10 years, Ireland's food and drink offering has a significant role to play in delivering great visitor experiences, increasing dwell time around the country and growing spend. Indeed, path to purchase research in recent reviews of both the German and US marketplaces has pointed to the important role Irish food and drink can play in persuading potential visitors to travel.

The aim of the strategy set out in this document is twofold:

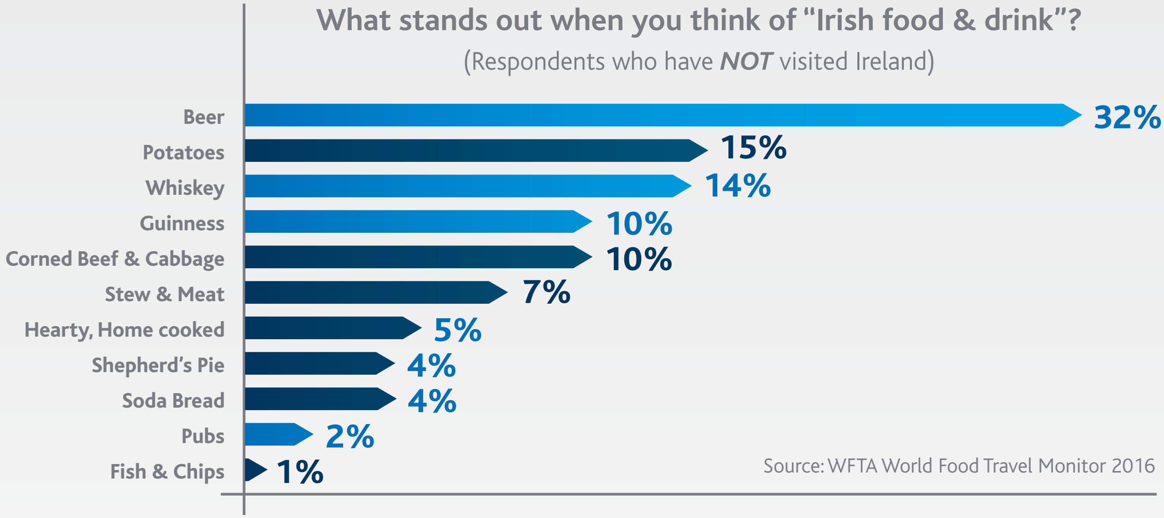
1. We will increase the availability of great Irish food and drink experiences across the country and across every day-part. In this regard, we will seek to collaborate with relevant agencies to underpin the quality and sustainable practices of the Irish food and drink sector.

2. We will increase the capability of Irish food & beverage operators to deliver a world class offering that is consistent and profitable.

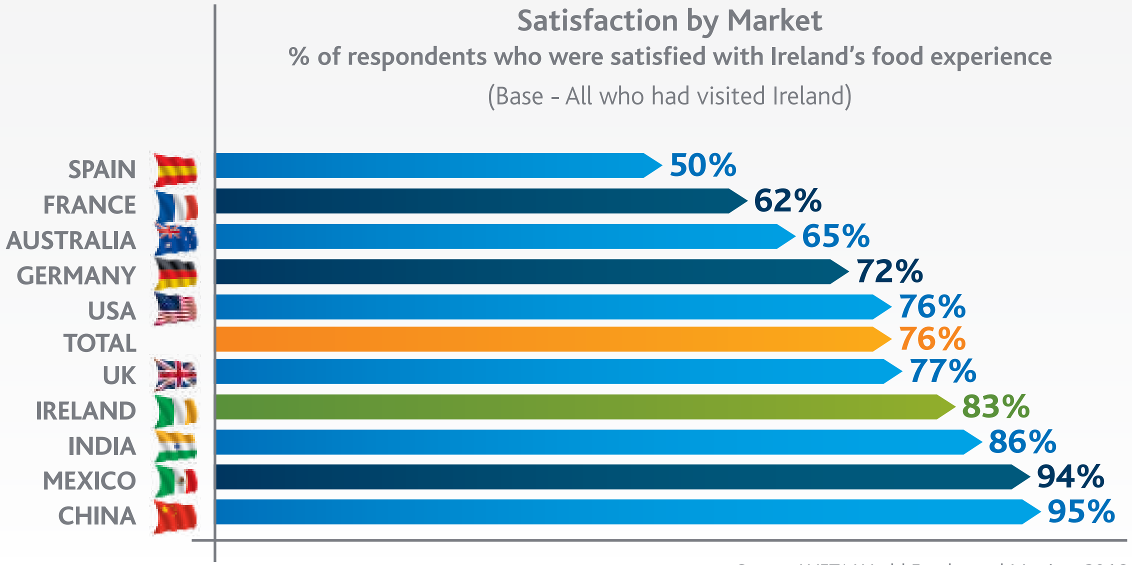
3. We will intensify our efforts to ensure Irish food and drink features more prominently in the collective marketing and sales efforts of Ireland's tourism industry (state agencies and private sector).

The strategy that follows sets out the key work pillars that will deliver on these ambitions in the years ahead. Whilst a 5 year perspective is being taken, key interim milestones and key performance indicators will be set to ensure that the strategy document is being monitored and tweaked as appropriate in the years ahead.

EXPECTATION PRE VISIT



FEEDBACK POST VISIT



Source: WFTA World Food travel Monitor 2016

INTRODUCTION

A flourishing tourism industry is crucial to ensure Ireland's economic prosperity, and to help shape our image as a great place to visit.

Ireland is a leading tourist destination thanks to its natural beauty, green credentials, vibrant culture, warm welcome, and wholesome food and drink offering.

1.1 Why Food Tourism

However, the international competition is intense. If we want to make sure that our tourism industry keeps growing, we must innovate in order to add value and strengthen Ireland's appeal in international markets.

One of the areas we need to develop is the food and drink experience that Ireland offers. Food and beverage consumption is an intrinsic part of the tourist experience. It can play a strong role in affecting destination choice, it's an important channel for tourists to experience the local culture, and *spending on food comprises of one-third of tourists' total expenditure*. Currently, in Ireland, food and beverage accounts for 35% of overall visitor spend, equating to €2 billion.

An OECD study states:

> “*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.*[1]”

However, despite the increasing quality of our food and drink in Ireland, and our new experience offerings, we have a very limited world reputation in this area. Perceptions globally of the quality of Irish food in particular lag far below the reality.

To underpin this, The World Food Travel Association Food Travel Monitor 2016 found that 77% of holidaymakers were satisfied or very satisfied with Ireland's food offering. This rating increased to 83% among those whose prime motivations for selecting a destination relate to food and drink.

We need, therefore, to continue to build-out an improved food and drink offering to increase the likelihood of the visitor happening upon great experiences whilst in parallel ensuring that Ireland's food and drink offering gains a global reputation that matches the reality. We must tell a renewed story about the Irish food and drink experience, focusing on quality, authenticity, innovation and value for money. A consistent message needs to be heard from points of entry through to every restaurant and café. To achieve this, we also need a connected vision that links all stakeholders together behind a common ambition.

This strategy outlines a plan of action designed to ensure that, as part of a 5 year strategy by 2023, Irish food and drink has become a powerful enhancer of Ireland's experience brands; greatly improving the visitor's overall stay; and delivering sustained growth in per diem spend.

> **“Food Tourism includes any tourism experience in which one learns about, appreciates and/or consumes food and drink that reflects the local cuisine and culture of a place”**
> (OCTA)

[1] OECD (2012), Food and the Tourism Experience: The OECD-Korea Workshop, OECD Studies on Tourism, OECD Publishing.

1.2 Our ambition

This strategy has been formulated in the context of DTTAS's *People, Place & Policy*[2] statement and the associated tourism action plan with a view to driving momentum within the sector. The priorities identified here are designed to support that policy framework and to achieve progress by:

- Growing substantially 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 the 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.

1.3 Overall Approach

In developing this Food and Drink Strategy, a new approach was taken, including extensive external consultation to ensure that many perspectives and insights were captured, multiple stakeholders were consulted, and extensive desk research was undertaken.

The resulting strategy identifies the key investment areas that will contribute to our overall tourism growth ambitions.

[2] DTTA's People, Place & Policy growing Tourism to 2025

1.4 Building on the success of previous strategy

This strategy builds on Fáilte Ireland's Food Tourism Activity Plan 2014-2016: Enhancing Irish Food Experiences – The Way Forward. Its aim was to ensure that:

> “*Ireland will be recognised by visitors for memorable food experiences, which evoke a unique sense of place, culture and hospitality.*”

The previous strategy has led to many successful initiatives. For example, the Boyne Valley Food Series and the Burren Food Trail brought together groups of businesses to deliver a schedule of unique food events, leading to increased turnover by local businesses. Fáilte Ireland applied an enabling approach when seeking to enhance food tourism offerings, such as food festivals, the number of which has greatly increased. Ireland's Food Story Toolkit' created a single unified message around our food offering, which was widely shared with the tourism industry.

Fáilte Ireland also established the Food Series concept, a schedule of food-related events within a region, spread over a defined period of time; partnered with Euro-toques and the Young Chef Programme to capitalise on the wealth of our culinary talent, and created and supported a range of industry awards to recognise and promote emerging Irish cuisine.

As well as the Boyne Valley Food Series and the Burren Food Trail, successful initiatives include A Taste of West Cork, Sligo Food Trail, Food on the Edge, Ballymaloe LitFest, Dublin Food Chain and A Taste of Lough Derg.

The adoption of the previous strategy by regional authorities led to successful local strategies aimed at promoting regional food sectors. These initiatives developed connected networks with appropriate accreditation, aiming to improve Food in Tourism while supporting local economies. Particular gains have been made in Cork with the Taste Cork experience-led marketing initiative that places the visitor at the centre of all activities. They provide a template for much of what needs to be achieved by demonstrating how food and drink can greatly enhance the tourist experience while boosting economic development and strengthening and sustaining local food systems.

Two exemplars that preceded the Food Tourism Activity Plan are Good Food Ireland and Ballymaloe. Good Food Ireland consists of a collection of good food places all over Ireland that strongly believe in using local food and drink, supporting farmers, food producers and fishermen. They seek to immerse visitors in the 'farm to fork' lifestyle and provide unparalleled connected experiences. In County Cork, decades before the idea of Food Tourism was born, Myrtle Allen, the late Ivan Allen and others lay the foundations of a richly diverse food culture, sourcing local, high-quality ingredients and supporting the people who produce them. Myrtle Allen also established Euro-Toques Ireland, "Custodians of Irish culinary heritage and the food culture of Ireland today and tomorrow" in 1986.

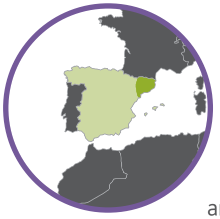
Such initiatives have achieved success because they started at the grassroots, were driven by passionate individuals, linked food to the land, and offer experiences in line with consumer trends.

In line with global trends, the previous strategy witnessed the start of strong growth in the craft drinks sector in Ireland, coupled with a resurgence in diversity across distilleries and micro-breweries. Bord Bia research states that the number of micro-breweries in Ireland has quadrupled since 2012, with projections of 100+ in operation by 2020[3]. According to IBEC, in 2013 there were four distilleries and five visitor centres on the island. That number now totals 16 working distilleries, while another 13 have planning permission and many more projects are at various stages of planning. These distilleries will reach across 18 counties and most will have visitor centres to meet the demand of tourists. Irish whiskey continues to be the fastest-growing premium spirit in the world[4]. While it remains to be seen how sustainable this proliferation of micro-breweries and distilleries will be over time, they do offer a wide variety of new experiences for visitors to Ireland. Fáilte Ireland will strive to ensure micro-breweries and distillery experiences are integrated into the overall Food and Drink Strategy 2018-2023.

[3] Feeeney, B (2016). Craft Beer and Microbreweries in Ireland, 2016. A Report for the Independent Craft Brewers of Ireland and Bord Bia.
[4] Irish Whiskey Association (2016). Irish Whiskey Tourism Strategy. Dublin: IBEC.

1.5 Learning from leading food countries / regions

We can be guided by the initiatives taken in other countries / regions such as Catalonia, Peru, Australia and the Netherlands.



CATALONIA – food as a growth multiplier

Catalonia wanted to create a compelling proposition to take tourism beyond Barcelona and to ensure a sustainable future for the region. It looked to food to deliver a growth multiplier in the region, focusing on four key pillars:

VINEYARDS – leveraging the legacy of Catalonian vineyards

INDOOR MARKETS – the city council invested money for renovation and rescinded ratio rules on vendors selling ready-to-eat and raw ingredients

UPSCALE CUISINE – Catalonia has gained a reputation for fine dining and boasts many Michelin-star restaurants

INVESTMENT IN INFRASTRUCTURE – city councils increased rail and bus options

The rewards were remarkable. It was estimated that:

- **44%** of visitor spend was spent on food and beverages
- For every $100 spent in a local business, **68%** stayed in the local economy and **32%** left
- For every $100 spent in a non-local business, **43%** stayed in the local economy and **57%** left

In 2015, tourism generated over €10bn of in-destination spend for the autonomous region of Catalonia. A total of 40% of that went to food and beverage products and vendors.

Reference documents review p46

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PERU
– world-leading food destination

The World Travel Awards (WTA) selected Peru as the World's Leading Culinary Destination in 2016 – for the fifth consecutive year. Peru's gastronomic rise to the top over the past 15 years has become a source of national pride and a motor of the economy, as rising numbers of tourists travel to sample its original and varied cuisine.

Peru recognised the value of its food culture for tourists and repackaged what it already had under a new umbrella proposition:

- **MARKETING CAMPAIGN** In 2015, PromPeru (the Peru Export and Tourism Promotion Board) launched an international tourism campaign, inviting potential visitors to 'Discover the "you" you never knew in The Land of Hidden Treasures'.
- **AWARDS** Peru promotes its food offering by focusing on its accolades such as 'World's Leading Culinary Destination'.
- **FOOD FAIRS** Peru promotes its food fair, Mistura, with exotic local produce, as a tourism attraction for visitors and locals alike.
- **LEVERAGING UPSCALE CUISINE** Peru used the reputation of Gaston y Astrid on the international stage to create a new perception of Peru's food.

AUSTRALIA
– 'the world's greatest restaurant'

Australia closed the perception gap between the clichéd view of Australia and the superb cuisines they have to offer. It did this by:

- Presenting itself as 'the world's greatest restaurant' by serving up unique food and wine experiences.
- Tapping into the global groundswell of interest in epicurean tourism.
- Highlighting the diverse nature of Australia's food and wine offering.
- Confounding rather than reinforcing the shrimp and 'barbies' stereotypes.
- Focusing on three key elements of a visitor's food and wine experience: 'People, Produce and Place' – relying on farmers, chefs, winemakers and tourism operators to tell their stories.

Tourism Australia and partners have invested $75m in the campaign over the past two years. The target to increase international visitor spending on food and wine by at least $500m by December 2015 was achieved six months ahead of schedule, and the extra spend now exceeds $1bn.

THE NETHERLANDS
– food/culture integration

The Dutch identified the seven key elements of their culture and integrated the food experience with each.

Similar to Ireland, the Netherlands aims to not only maintain market share but to stimulate sustainable growth (25% to 2020) across three core areas: Regional Spread, Seasonality, and Value.

The Dutch, recognising that their cuisine was not 'a household name' internationally, sought to change that perception.

They segmented visitor experiences by Beach, Water, Cycling, Flowers, Amsterdam, Dutch Masters, Traditional Dutch (Heritage), and the New Dutch Creative Scene. But all is underwritten by food, which is seen as a core pillar of the efforts to enhance visitor satisfaction.

Reference documents review p46

Lessons we can learn

IN SUMMARY:

- Catalonia looked to food to deliver a growth multiplier in the region, focusing on four key pillars: vineyards, indoor markets, upscale cuisine and investment in infrastructure.
- Peru recognised the value of its food culture for tourists and repackaged it under a new umbrella proposition.
- Australia presented itself as 'the world's greatest restaurant', highlighting the diverse nature of its offering, and focusing on three elements of the food wine experience: People, Produce and Place – relying on farmers, chefs, winemakers and tourism operators to tell their stories.
- The Dutch identified the seven key elements of their culture and integrated the food experience with each, focusing on Regional Spread, Seasonality and Value.

Catalonia, which already had a good reputation for food and drink, enhanced its offering by focusing on four key areas. Peru, also known for the quality of its food, repackaged its offerings under a new umbrella theme. They used specific levers to change perception and amplify their offering. However, the Australian and Dutch examples are of particular relevance for Ireland.

Both recognised that they did not have a high reputation globally for food and drink. Australia aggressively sought to close the gap between the clichéd view of its food and drink culture and the superb cuisines it has to offer ('the world's greatest restaurant'), while the Dutch made food and drink a core pillar of their efforts to enhance visitor satisfaction.

Whilst Irish Food and Drink produce is gaining reputation overseas, thanks to our small island status, grass based productions and growing sustainable practises, the connection between ingredient/product and Ireland as a place with a great food and drink experience is not yet fully realised.

Our strategic focus therefore, needs to be on shifting the emphasis by enhancing our national menu and amplifying it's strong connection to people and authentic place.

THE OPPORTUNITY

2.1 The Target Market

The World Travel & Tourism Council (WTTC) anticipates that tourism will have a global value of US$ 10.8 trillion by 2018, almost double its worth in 2015. By 2022, it is anticipated that tourism will support 328 million jobs, or one in every ten jobs, and half will be in the food, hospitality and hotel sector.[5]

The food expectations of tourists have risen in recent years, driven by intense social media activity around unique food and drink experiences. The mainstreaming of Food in Tourism is driving growth and expansion in both current and emerging markets. More and more travellers want to experience different cultures through food and beverage-based activities.

While studies that focus on the regional and global markets of fully independent travellers are still scarce, a look at a few key markets helps illustrate the scale of the burgeoning trend. For example, research from 2015 estimates that the number of annual trips booked in Europe that were primarily focused on food and wine was 600,000; the number rose to 20 million annual trips when these are included as a secondary demand. Annual growth is expected to be between 7% and 12%.[6]

MOTIVATIONS OF TOURISTS

Travel motivation plays a strong role in determining tourists' behaviour. It determines not only if the consumer will engage in a tourism activity or not, but also when, where and what type of experience they will pursue.

When it comes to food and beverage, tourists can be broadly categorised as:

GROUP	FOOD FOCUS	% OF MARKET
Culinary Tourists	They seek unique, memorable eating and drinking experiences	10%
'Food as Fuel' Tourists	They want to consume food as quickly and as cheaply as possible	10%
Leisure Tourists	They want high-quality food and experiences but this is not a primary motivation for travel	80%

[5] World Travel & Tourism Council, 2015

[6] Petrak, N. & Beckmann, C. (2015). Taste The Adventure: Exploring the Intersection of Food Experiences and Adventure Travel. Seattle, USA: Adventure Travel Trade Association.

Research indicates that over a third of tourist spending is devoted to food[7]. Even though culinary tourists spend more on food and beverage, there are many more non-culinary tourists to tap into.

For culinary tourists, food is the primary motivation for travelling to a destination. Visitors want to try new foods, taste foods in their traditional context, or dine at celebrated restaurants. For example, they may travel to Denmark specifically to experience Noma.

For most tourists to Ireland, on the other hand, good food experiences are not the primary reason for visiting, but they help to determine destination choice and contribute greatly to enhancing a holiday and creating good memories– in the way that, for example, visitors experience food as part of the culture of a destination such as Italy.

To secure strong advocacy for food in Ireland and to improve revenue, we need to create compelling food and drink experiences that appeal not just to culinary tourists but to most visitors.

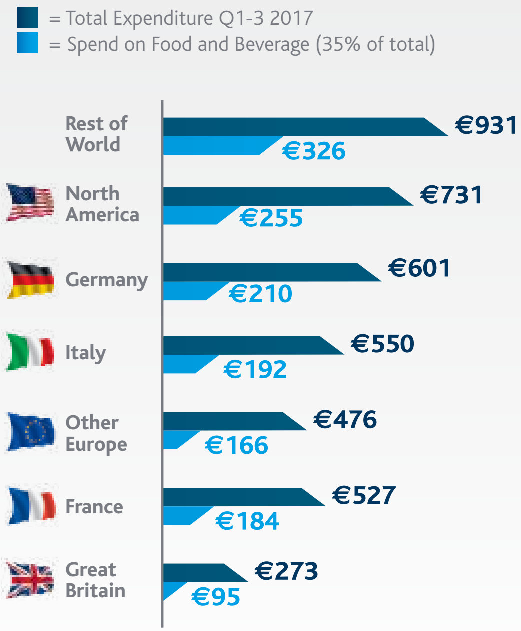
This strategy focuses, therefore, on developing Food and Drink in Tourism and its accessibility and appeal to our best prospective segments across our main international markets, the USA, UK, France and Germany.

By continuing to support and enable local and regional food tourism offerings to visitors, Fáilte Ireland will facilitate growth multipliers and economic retention across local communities.

2.2 The opportunity in numbers

In 2017, an estimated €2billion was spent by overseas tourists and domestic holiday makers on food and drink[8]. By investing in food and drink as part of Ireland's tourism offering and increasing the overall number of visitors to Ireland we aim to grow the value of this spend by €400 million to €2.4 billion by 2023.

AVERAGE EXPENDITURE PER VISIT



Source: ITIC Estimates

[7] Quan, S. & Wang, N. (2004). Towards a structural model of the tourist experience: an illustration from food experiences in tourism. Tourism Management, 25, 297-305.

[8] Fáilte Ireland estimates: excluding that consumed in accommodation

Food in Tourism accounts for **around €2bn or 35% of total revenue** from visitors to Ireland (2017)

2.3 Developing and improving our Food and Drink experiences

It is now widely acknowledged that it is no longer sufficient to sell a tourism product – a memorable experience must also be provided. For this strategy to be successful, we must enable the conditions to deliver visitor-centred world-class food and drink experiences through consistent improvement and innovation.

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

1 The **product must be authentic.**

2 The **service must be of high quality.**

3 The **story must be distinctive.**

4 The **narration must have a unique character.**

Fáilte Ireland is developing visitor experience development plans that will assist in planning and establishing memorable tourism experiences across the key brand propositions. A number of directions 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 generate at least one overnight stay. They represent the essence of the brand experience proposition. They usually have one or two key attractions at their heart, called '*hero products*'.

SUPPORTING EXPERIENCES

While not being motivational in their own right, these provide visitors with a wide range of options to see and do in an area. They help to retain people in an area and are expected to also deliver on the particular brand promise.

ANCILLARY EXPERIENCES

These are a range of other experiences that visitors expect any high-quality destination to have, including restaurants, pubs and accommodation.

Markets use specific levers to change perception and amplify their offering, including famous chefs, produce, awards and food fairs *(see examples of Catalonia and Peru in Section 1.5)*. From a food and drink perspective, Ireland's unique point of differentiation is our larder. This needs to be amplified across all tourism experiences in order to tell a unique place story.

With some exceptions, the majority of Food Tourism businesses are considered to be developed as supporting and/or ancillary destination experiences.

Ireland's visitor segments have specific wants but they all seek food experiences that are authentic, of high quality and rooted in local culture.

The ***Culturally Curious*** seek to broaden their minds and expand their experiences by exploring new landscapes, history and culture. They want authentic, engaging experiences that unlock local stories and connections. They need reassurance.

In addition to high-quality offerings at mealtimes, sample food and drink experiences of appeal include:

- Food festivals or taste events that present local cuisines.
- Distillery or brewery visits.
- Local food markets.
- A visit to a local producer or processor.
- Activities such as 'catch and cook' and 'make your own'.
- Guided trails and tours.
- Long-table dining.
- Interdisciplinary experiences with a strong feature of local food such as Culture, Arts, Adventure and Wellness experiences and events.

Great Escapers are attracted by unique experiences outside the main tourist thoroughfares. They want rural holidays and food that is good-value, of a wide range (to suit them and young families), and relevant to local activities. They also want it to be affordable. They enjoy:

- Self-guided food and foraging walks and trails that are linked to landscape/seascape.
- Producer experiences such as farm visits.
- Visiting specialist food shops, bakeries and markets.
- Non-intrusive, high-quality food offerings, picnic baskets, food trucks.
- Long-table dining.

Social Energisers want fun, exciting, novel experiences and memories they can share on social media. Examples of offerings that could be developed are:

- Urban food tours.
- Affordable gastronomic experiences.
- Shared experience dining.
- Food trucks and stands.
- Non-traditional dining, innovative pop-ups.
- Socially responsible food concepts.
- Indoor food halls, multi-concept.
- Food and drink pairing events.

* *A validation review is currently being carried out with international segments, to further our understanding of motivations and behaviours, and to future-proof the model to feed into Fáilte Ireland's strategies.*

2.4 Food and Drink as an enhancement of our experience brands

Food and Drink can become a powerful enhancement of Fáilte Ireland's experience brands, greatly improving the visitor's stay while delivering sustained growth in daily spending. Below we look at the core propositions and strategic objectives of each brand within the current portfolio. It is clear that food and drink can be used as a lever to deliver on most of these objectives; in particular, these experiences can be a very tangible expression of our local heritage and culture and introduce a large measure of sociability into the offerings.

WILD ATLANTIC WAY®
SLÍ AN ATLANTAIGH FHIÁIN

BRAND PROPOSITION

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

The Wild Atlantic Way is Ireland's first long-distance touring route, stretching 2,500km from The Inishowen Peninsula in Donegal to Kinsale in Co Cork and covering six zones. A total of 181 Discovery Points along the route are being enhanced, including 15 Signature Discovery Points.

The brand was developed with the aim of unifying the west coast as a tourist destination, offering visitors an experience that immerses them in multiple ways so that they feel stimulated, energised and uplifted. Three overarching themes were identified to guide the future development of the Wild Atlantic Way:

- Spirit of Adventure *(Adventure)*
- Life Shaped by the Atlantic *(Culture)*
- Where Land and Sea Collide *(Landscape and Seascape)*

STRATEGIC OBJECTIVES

1. Generate and sustain economic opportunity and economic development through tourism in the West of Ireland.
2. Repackage 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. Increase visitor numbers, dwell time, spend and satisfaction in the destinations.
4. Increase visitor numbers to less-visited areas and encourage better visitor management in the other areas.
5. Serve as the catalyst for an increase in collaboration between destinations, industry providers and groups along the west coast.
6. Improve the linkages between and add value to a range of attractions, activities and experiences.
7. Reinforce the strengths and characteristics of the key destinations along the route (e.g. Ring of Kerry and Connemara) while offering the visitor compelling overarching reasons to visit.
8. Ensure that the Wild Atlantic Way is delivered in accordance with the principles of sustainable tourism, so that economic, social and environmental benefits are delivered in a balanced way.

IRELAND'S ANCIENT EAST®

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 madeilluminating by stories from the best storytellers in the world."

Ireland's Ancient East focuses on the wealth of cultural and heritage attractions in the area. The overarching theme is focused on 5,000 years of European history, lush green landscapes and stories told by the best storytellers in the world.

STRATEGIC OBJECTIVES

1. Drive growth in international visitor numbers, tourism revenue and associated tourism employment in the regions which currently underperform in these areas.
2. Transform Ireland's East and South from a transit and day tripping zone to a destination that attracts international overnight visitors.
3. Develop a world-class visitor experience, which delivers fully on the brand promise.
4. Differentiate the destination within the international tourism marketplace on the basis of the quality of its heritage experiences and a clear and memorable narrative that links all experiences within it.
5. 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. Ensure that Ireland's Ancient East is delivered in accordance with the principles of sustainable tourism, so that economic, social and environmental benefits are delivered in a balanced way.

Dublin A Breath of Fresh Air

> *"The Dublin brand, 'Dublin. A Breath of Fresh Air' seeks to reflect Dublin's unique position as a vibrant, cool and hip capital city bursting with a variety of surprising experiences. The objective is to enhance the overall visitor experience and uniquely position the city and surrounding bay and mountains by offering memorable experiences via key market-focused themes."*

STRATEGIC OBJECTIVES

1 Drive growth in international visitor numbers, tourism revenue and tourism-related employment.

2 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 Reposition Dublin from being seen mainly as an alcohol-fuelled party city to a 'must visit' destination with an evolving breadth and depth of stimulating experiences.

4 Establish and improve awareness of the Dublin brand and proposition to Dubliners and overseas markets.

5 Engage the wider community and all who love Dublin to get behind the brand and messaging.

6 Better incorporate the sea and mountains as key elements of the Dublin proposition, helping visitors to find experiences outside the top ten and encourage visitor flow outside the city centre.

7 Develop compelling and stimulating visitor experiences which are attractive to our target market segments.

8 Embrace the arts and cultural interests in the city that would not ordinarily see themselves as being in a tourism arena.

9 Ensure that the Dublin proposition is delivered in accordance with the principles of sustainable tourism, so that economic, social and environmental benefits are delivered in a balanced way.

MIDLANDS

Currently in development, launch in 2018

"Explore the green heartlands of Ireland's natural rural beauty where activity and relaxation are centred around rural communities and their lifestyles, that can be discovered across a lattice work of land and water trails showcased by the iconic River Shannon and the Beara Breifne Way."

CONCLUSION

Food and drink can play a substantial part in helping to deliver most of the strategic objectives of our experience brands.

In general, they can enhance these brands by improving the visitor's experience while increasing daily spending.
More specifically, they can contribute greatly to the achievement of objectives such as the following:

- Generate and sustain economic opportunity and economic development.
- Increase visitor numbers, dwell time, spend and satisfaction in the destinations.
- Increase visitor numbers to less-visited areas.
- Improve the linkages between and add value to a range of attractions, activities and experiences.
- Reinforce the strengths and characteristics of the key destinations.
- Drive growth in international visitor numbers, tourism revenue and associated tourism employment.
- Disperse visitor traffic towards 'hidden gems'.
- Establish the destinations as a 'must visit', with an evolving breadth and depth of stimulating experiences.

2.5 Innovations that can be leveraged

Since visitors can experience most food types globally, they enjoy and value experiencing them in their authentic place. Memorable food and drink experiences can be broken down into four main themes[10]:

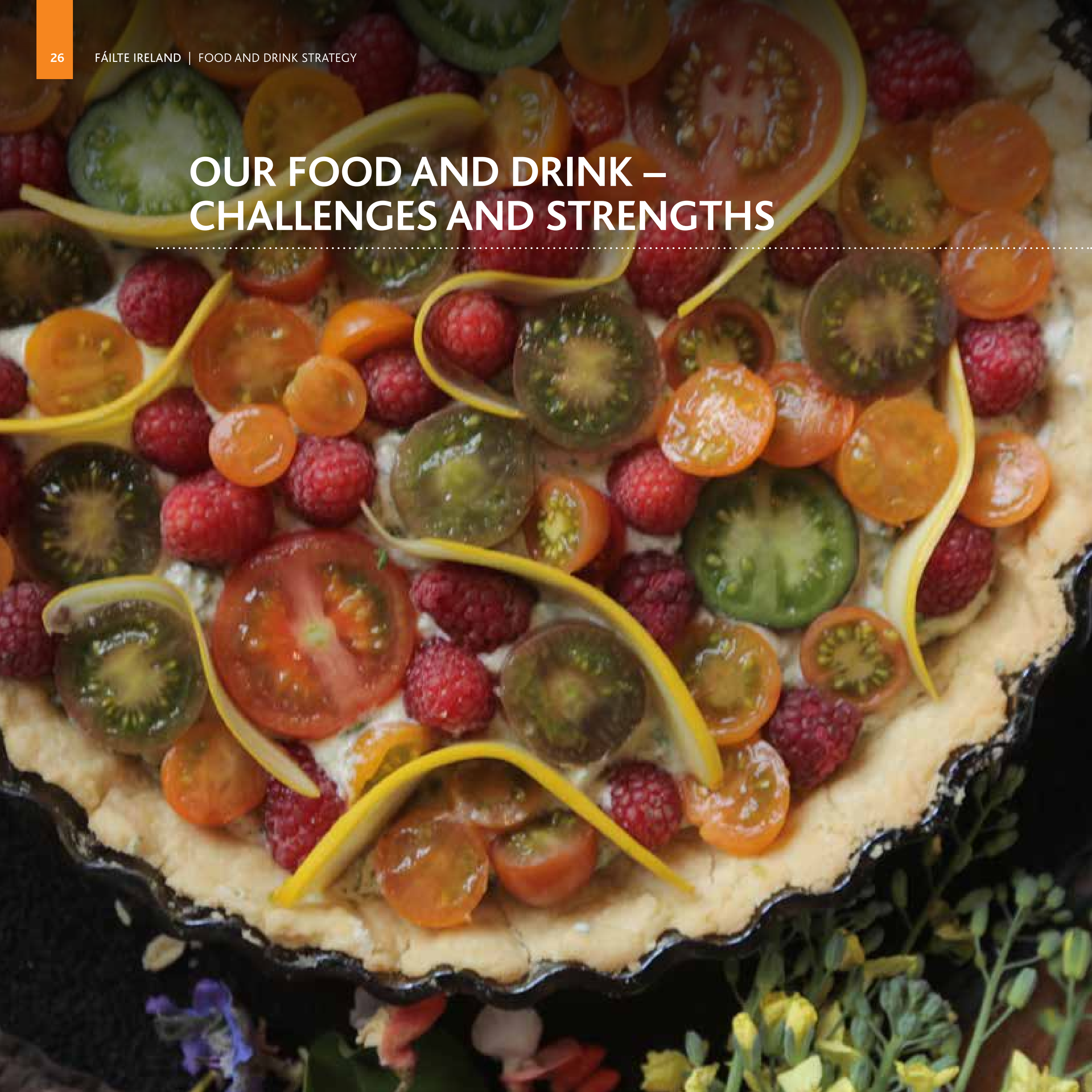
- Authentic and Real
- High Quality Produce
- Close to Source
- Iconic Food and Drink Experiences

Providing innovative food experiences is a relatively easy way to amplify local culture, increase share of impulse spend, and develop local jobs. Ireland has started to provide such experiences, but there is potential to develop further ones, such as[11]:

- Long-table dining: social dining, arising from the sharing economy and rejection of traditional institutions – people want a more natural feel.
- Local sourcing – including low footprint menus, zero km, similar to above.
- Foraging/trails – sustainable, natural food sourcing, a good family activity.
- Gourmet fast food – tasty fast-food without the guilt.
- Food trucks – bringing street food to the masses in a renewed way.
- Slow food – preservation of local and regional cuisines and cooking methods.
- Food pairing – growth of craft has increased interest in the pairing of beer and spirits with food.
- Indoor markets – local and regional cuisines and methods.

[10] Source: Food Travel Monitor 2016; MCCP Trendstream™.
[11] Source: Food Champions Workshop, in-depth interviews, MCCP Global Trendstream™.

OUR FOOD AND DRINK – CHALLENGES AND STRENGTHS



3.1 Overcoming prevailing perceptions

Improving Ireland's food and drink offering presents many specific challenges, but an overarching one is the global perception of that offering.

Studies show that, globally, Ireland has an image as a nation of friendly, warm, welcoming people, as a land of green fields and natural abundance, and as being pure and free of the pollution typically associated with industrial production.

However, when it comes to food, the prevailing stereotypes are far from the current reality. A Fáilte Ireland visitor survey showed that, pre-visit, tourists did not really consider Ireland to be a food destination, and came with low expectations. In contrast, after their visit, they expressed praise for the quality of Irish food, although they generally did not view the range of food as extensive, and pointed to the lack of emphasis on fish.

Global research confirms this, showing the substantial gap between preconceptions before visiting Ireland and actual experience in the country.

AUDIENCE	HIGH-QUALITY FOOD OFFERING	MEMORABLE FOOD EXPERIENCES	BROAD RANGE OF FOOD TYPES
Perception: US VISITORS	48.5%	53.3%	46.1%
Reality: US VISITORS	**69%**	**72.4%**	**56%**
Perception: GLOBAL VISITORS	43%	50%	42%
Reality: GLOBAL VISITORS	**70%**	**65%**	**64%**

Source: The American Culinary Traveler: Ireland Custom Questions, World Food Travel Association Ireland Report, USA 2016

In general, visitors expect Irish food to be similar to that in Britain, given our close ties to the UK, and our dominant exports, Guinness and whiskey. They expect to find fish and chips, bangers, various beers (especially Guinness), spirits (especially whiskey), an Irish breakfast, an abundance of potatoes, and bland food. Source WFTA*

A major marketing effort is needed, therefore, to ensure that our food and drink offering gains a global reputation that matches the reality. We need to tell a new story about the Irish food and drink experience, focusing on quality, authenticity, innovation and value for money.

3.2 Weaknesses highlighted

Consultation and engagement with stakeholders during the preparation of this strategy[12] highlighted the following weaknesses:

- Poor knowledge around Ireland's food heritage.
- The story of Ireland as a place with great food and drink experiences is not being articulated well, if at all.
- Restrictive legislation surrounding sale of products (eg. source selling of craft beers, gins, whiskeys).
- Lack of good-quality food offerings in many high-density tourist sites and some accommodation sectors.
- Absence of or weak food offering in some Irish pubs.
- Lack of understanding among some tourism operators and the industry in general of the value of improving and localising the food offering.
- Poor business development capacities in the food industry, particularly around the saleability and impact measurement of food tourism experiences.
- Lack of a collective identity to support and integrate the excellent work being achieved by many producers, restaurateurs, etc.

CHALLENGES IN DELIVERING A QUALITY EXPERIENCE

The consultation also identified challenges on many levels in delivering excellent food and drink experiences across all 'experience points' and around the quality of offering across tourism-focused operators.

These challenges are:

- General apathy about the benefit of high-quality and local food and drink experiences, in part due to lack of awareness about the wider commercial benefit of offering good food and drink
- Lack of knowledgeable frontline staff across different offerings
- Poor retention of some staff in the sector
- Insufficient understanding and appreciation of value across the different offerings
- Cost management – high-quality food requires better skillsets and higher wages
- Lack of innovation around food offerings of mid-range quality (and thus the high incidence of 'chips' menus)
- Lack of strong food offerings and stories at many visitor attraction sites
- Lack of cross-selling and local networking to create width and depth of offering
- Limited understanding as to the food requirements of visitors from new and developing tourism markets and poor evidence of tailored and identifiable offerings.
- Lack of consistent and optimal use of digital tools

[12] During in-depth interviews and at Fáilte Ireland workshops.

3.3 The Brexit challenge

The planned exit of the UK from the European Union presents another challenge – one that is as unpredictable as it is large scale.

The tourism and hospitality sector is one of the service sectors exposed to the competitiveness challenges posed by depreciation of sterling against the euro. It has already been estimated that Irish hospitality businesses face the loss of about €100m in 2017 because of the slump in the British pound and British holidaymakers' reduced spending power.[13]

Ireland's tourism sector, which accounts for 220,000 jobs, is highly dependent on the UK. It is Ireland's biggest inbound tourist market, with over 3.6m visitors in 2016 or 41% of total visitors, and spending of over €1bn.

The most-exposed sectors generally comprise indigenous enterprises that are small in scale, are highly linked to the rest of the economy, have high levels of regional employment, and have relatively low profit levels.[14]

Apart from government measures to help such sectors remain competitive, value for money for visitors is more important than ever in order to maintain our competitiveness, at least in the short term.

How Brexit will affect Ireland's tourism sector in the longer term will largely depend on the level of open trade and travel agreements that the UK will have with its EU neighbours. However, any increased border controls, slowing in the UK economy and reduced business and leisure travel to Ireland could have a strong effect on our hotel and tourism industry.

Given that the nature of Britain's new relationship with the EU is not yet clear, we cannot predict what actions might need to be taken to counterbalance any fall off in the numbers and spending of British visitors. However, we will have to respond rapidly to any developments, keeping a close eye on how they might affect our Food and Drink Strategy.

[13] http://www.itic.ie/BREXIT-BULLETIN-NOVEMBER-2017/index.html
[14] Getting Ireland Brexit-Ready, Department of Finance, October 2016: http://www.budget.gov.ie/Budgets/2017/Documents/Getting%20Ireland%20Brexit%20Ready_final.pdf

3.4 Ireland's Strengths

Ireland has many strengths relating to food and drink, such as:

- Our reputation for hospitality and welcoming engagement with visitors.
- Good 'green' credentials – lush green landscapes and clean seas.
- Fresh, natural produce.
- A diverse range of restaurants and food producers.
- A wide variety of distilleries and breweries.
- Increasing practices around local sourcing driven by an emerging wave of culinary talent.
- Many mobilised food networks and passionate individuals (producers, restaurateurs, etc.) doing excellent work.

3.5 Promoting and leveraging our assets

Given the rapid growth in this area, now is the time for us in Ireland to leverage our strong offering, and contribute to growth in tourism. We need to appreciate and play on our strengths, and take action when it comes to our weaknesses.

The consultation and engagement with stakeholders revealed a story of underleveraged food and beverage assets, including:

- **Authentic & Real** – cuisines representative of regional food cultures and prepared using local ingredients, according to traditional methods of processing and serving.
- **High-quality Produce** – in taste/flavour, texture, appearance, etc.
- **Close to source/local:** 'grown not flown' – fresh produce, farm to fork, free range, grass-fed.
- **Iconic Experiences** – such as the Irish Pub, Guinness and Whiskey, The Galway Oyster festival and 'must do' food activities within destinations.

We need to consider these assets in all destination marketing efforts. We also need more industry advocates for Irish food and drink, spreading the message that good food and drink offerings are good for business, and for industry to adopt a consistent narrative around food and drink in Ireland.

FOOD AND DRINK STRATEGY

4.1 Overall aim

The overall aim of this strategy is to:

- Consistently enhance the visitor experience through food and drink and make a strong contribution to overall tourism revenue growth

This will be achieved by;

- Growing the number of tourism operators engaged with food and drink development initiatives such that the probability of encountering great experiences increase.

- Working to build an enhanced awareness and perception of Ireland's food and drink offering.

4.2 Key performance metrics

Currently, we are not measuring the impact of Food in Tourism. We need to establish a baseline and, once this strategy is being implemented, measure:

- Increased spending by visitors on food and drink.
- Food and Drink's impact on visitors' net satisfaction rating.
- Number of tourism businesses engaged with food and drink initiatives.
- Key economic indicators for F&B.
- Local food and drink as growth multipliers.
- The closing of the gap between perception and reality regarding Irish food.

These measures will ensure that the contribution of Food and Drink in Tourism to economic growth is fully recognised and understood.

4.3 Strategy review

The world will continue to evolve over the coming years. New trends and insights will need to be taken account of, and innovative and creative projects may need to be supported. We also need to monitor the effectiveness of the strategy and the sustainability of any particular initiatives.

Therefore, a review should be undertaken in 2020 to identify what is working best, refresh the strategy as required, and make necessary changes.

INVESTMENT PRIORITIES

This strategy seeks to identify the areas of investment that we need to focus on that will best deliver sustainable growth in the Irish tourism sector. The immediate actions outlined will not be enough to achieve the aims set out. Action also needs to be taken at stakeholder level to address challenges and develop opportunities specific to the priority areas.

FOOD AND DRINK STRATEGY (INVESTMENT PILLARS)

5.1 Insight and Innovation

Ensure that tourism stakeholders are aware of the economic opportunity of offering a quality food and drink experience by devising actionable insights to inform development and investment in this area.

ACTIONS

- Create a baseline and measurement process to unlock food and drinks economic impact on tourism.
- Identify opportunities for industry to participate on international benchmarking trips to drive innovation and experience development. (Applied learnings demonstrated).
- Enable development and co-opetition of emerging food networks through mentor schemes with established food networks.
- Set the appropriate sectoral KPI's in to unlock food and drinks impact on visitor satisfaction and value for money ratings
- Develop a suite of case studies across multiple sectors to demonstrate that by delivering great food experiences, businesses can improve guest satisfaction and improve P&L performance.
- Work with industry and other state agencies to assist in the practical application of food trends for tourism businesses.
- Conduct a comparator study to measure the local economic impact of independently owned business and multi-national chains.

5.2 Strengthening Ireland's appeal

Seek to close the gap between perception and reality by investing in key promotional initiatives that help to raise Ireland's food and drink experience reputation overseas.

ACTIONS

- Pursue and invest in key promotional initiatives that actively work to build Ireland's food and drink reputation overseas and promote Ireland's food culture to potential visitors.
- Support sustainable regional efforts that showcase local food and drink as part of visitor offerings.
- Continue to ensure that quality Irish produce is featured across all incoming travel media and international buyer trips.
- Assist MICE (meetings, incentives, conferences & events) operators, destination management companies (DMCs) and professional conference organisers (PCOs) that are looking to use Irish food and drink to enhance experience and gain competitive advantage.
- Support stakeholders in creating compelling food and drink imagery and video that depicts an in-holiday experience for use across all campaigns.
- Explore brand Ireland promotional opportunities in conjunction with Tourism Ireland, Tourism Northern Ireland and Industry Partners.
- Scope and plan a tourism initiative of scale aimed at closing the perception gap to form the basis of food and drink strategy 2023 – 2028.

5.3 Driving industry capacity and performance

Develop industry resources to build the capacity and performance of food and drink businesses in tourism and tourism businesses with a food and drink offering.

ACTIONS

- Implement a programme to ensure that, in Ireland's visitor attractions, visitors encounter local foods that are seen as authentic products symbolising the place and its culture.
- Increase the number of accommodation providers offering a quality Irish Breakfast.
- Develop a programme to support pubs in bringing authentic local food and drink experiences to life.
- Work with the relevant state agencies in developing guidelines to assist food producers in rural communities to diversify into tourism.
- Support local familiarisation initiatives for front-of-house operators.
- Deliver a sustainable business management programme for food and beverage operations.
- Deliver a flexible suite of Menu Planning/Costing Programmes for all business and consumer types (e.g. Tour Group menus).
- Develop a capability programme for industry that tailors Ireland's local food story to the cultural requirements of new and emerging markets.

5.4 Delivering great visitor experiences

Contribute actively to the development of great visitor experiences in tourism by providing support for key initiatives that lead to the promotion and ultimate repositioning of Irish food and drink experiences in the minds of potential visitors.

ACTIONS

- Continue to support the new innovative experiences coming out of the Food Champion programme.
- Enable creative projects that seek to amplify local food cultures for visitors.
- Work with industry and other state bodies to develop food and drink experience trails that are aligned to our brand propositions.
- Facilitate the alignment of all food and drink experiences to our visitor development plans.
- Encourage food and drink operators to engage with Fáilte Ireland on a sustained basis.

ORGANISING FOR SUCCESS: HOW THE STRATEGY WILL BE DELIVERED

The objectives, priorities and actions associated with this food strategy, differ in some respects to those of our previous strategy. As the National Tourism Development Authority, our orientation is primarily focused on sustainable tourism growth placing the visitor experience at the centre of all activities. Fáilte Ireland will seek to play a leadership role in the priority areas outlined.

However, to achieve overall success, all stakeholders have to play their part in delivering what is needed. Our posture is one of proactive collaboration in areas of high relevance with our industry but requires a renewed focus on cross-collaborative initiatives to deliver outcomes of scale.

It is imperative that this interdependent strategy contributes to overall Tourism growth, it should consider stakeholder objectives when undertaking any actions, however, it is equally as important that strategies which refer to Irish food and drink, consider and work towards the priorities set out here. Destination marketing efforts have to reflect the good work that is being done on the ground. This can only be achieved by ensuring that all campaigns are underwritten by our food and drink experiences as key expressions of Irish and local culture and vice versa, these experiences have to ensure that a strong sense of place is incorporated in their own experience delivery and messaging. Only then can we succeed in closing the gap.

FÁILTE IRELAND COMMITMENT

Fáilte Ireland's Food, Industry Development, Communications, Quality & Standards, Regional Development and Marketing teams will collaborate in the development of winning programmes.

Fáilte Ireland will work in partnership with other State Agencies such as Bord Bia and Teagasc; as well as Local Authorities and LEADER programmes.

Last but not least, Fáilte Ireland will intensify its engagement with industry to ensure that every key consumer touchpoint with a food and drink offering is positioned to deliver a high quality experience to visitors.

TOP LINE ACTION PLAN AND DESIRED OUTCOMES

Summarising the range of activities which will be led by Fáilte Ireland in the coming years (road map).

AIM

- Consistently enhance the visitor experience through food and drink and make a strong contribution to overall tourism revenue growth

INSIGHTS AND INNOVATION

OBJECTIVE

To develop actionable insights to inform the development of food and drink in tourism and drive innovation in the sector.

DESIRED OUTCOME

The impact of food and drink and its contribution to tourism and the Irish economy defined and a process of continuous measurement implemented.

**at level of the firm and wider economy*

KEY ACTIVITIES

IMMEDIATE 2018 - 2020

1. Create a baseline and measurement process to unlock food and drink's economic impact economic impact on tourism.

   (To commence 2019).

MEDIUM 2020 - 2023

2. Identify opportunities for industry to participate on international benchmarking trips to drive innovation and experience development. (applied learnings demonstrated).

   (2 inspiration trips per year from 2020).

3. Develop a suite of case studies across multiple sectors to demonstrate that by delivering great food and drink experiences, businesses can improve guest satisfaction and improve P&L performance.

4. Conduct a comparator study to measure the local economic impact of independently owned business and multi-national chains.

ONGOING 2018 - 2023

5. Enable development and coopetition of emerging food networks through mentor schemes with established food networks.

   (2 schemes per year).

6. Set the appropriate sectoral KPI's to unlock food and drinks impact on visitor satisfaction and value for money ratings.

7. Work with industry and other state agencies to assist in the practical application of food and drink trends for tourism businesses.

STRENGTHENING IRELAND'S APPEAL

OBJECTIVE

To seek to close the gap between perception and reality by investing in key promotional initiatives that help to raise Ireland's food and drink experience reputation overseas.

DESIRED OUTCOME

Increased awareness around Irish food and drink experiences overseas followed by heightened expectations for potential visitors.

KEY ACTIVITIES

ONGOING 2018 - 2023

1. Pursue and invest in development and promotional initiatives that actively work to alter Ireland's food reputation overseas and promote Ireland's food culture to potential visitors.

   (2 per year).

2. Support sustainable regional efforts that showcase local food as part of visitor offerings.

3. Assist MICE (Meetings, Incentives, Conferences & Events) Operators, Destination Management Companies (DMCs) and Professional Conference Organisers (PCOs) that are looking to use Irish food and drink to enhance experience and gain competitive advantage.

4. Support networks and businesses in creating compelling food and drink imagery and video that depicts an in-holiday experience for use across all campaigns.

5. Continue to ensure that quality Irish produce is featured across all incoming travel media and international buyer trips.

6. Explore Brand Ireland promotional opportunities in conjunction with Tourism Ireland, Tourism Northern Ireland and Industry Partners.

7. Scope and plan a tourism initiative of scale aimed at closing the perception gap to form the basis of Food and Drink strategy 2023 – 2028.

DRIVING INDUSTRY CAPACITY AND PERFORMANCE

OBJECTIVE

To develop industry supports programme to build the capacity and performance of food and drink businesses in tourism and tourism businesses with a food and drink offering.

DESIRED OUTCOME

Tourism industry consistently delivers authentic, high quality and local food and drink offerings to visitors.

KEY ACTIVITIES

IMMEDIATE 2018 - 2020

1. Implement a programme to ensure that, in Ireland's visitor attractions, visitors encounter local foods that are seen as authentic products symbolising the place and its culture.
2. Develop a programme to support pubs in bringing authentic local food experiences to life.
3. Deliver a Sustainable Business Management programme for food and beverage operations.

MEDIUM 2020 - 2023

4. Support local food familiarisation initiatives for front-of-house operators.

ONGOING 2018 - 2023

5. Increase the number of accommodation providers offering a quality Irish Breakfast.
6. Work with the relevant state agencies in developing guidelines to assist food producers in rural communities to diversify into tourism.
7. Develop a capability programme for industry that tailors Ireland's local food story to the cultural requirements of new and emerging markets.

   (Particular focus will be placed on China, Gulf States and India in the short to medium term)
8. Deliver a flexible suite of Menu Planning/Costing Programmes for all business and consumer types (e.g. Tour Group menus).

DELIVERING GREAT VISITOR EXPERIENCES

OBJECTIVE

Contribute actively to the development of great visitor experiences in tourism by providing support for key initiatives that lead to the promotion and ultimate repositioning of Irish food experiences in the minds of potential visitors.

DESIRED OUTCOME

Deliver great food and drink experiences to visitors, increasing dwell time and per diem spend.

KEY ACTIVITIES

IMMEDIATE 2018 - 2020

1. Continue to support the new innovative experiences coming out of the Food Champion programme.

ONGOING 2018 - 2023

2. Enable creative projects that seek to amplify local food cultures for visitors.
3. Work with industry and other state bodies to develop food and drink experience trails that are aligned to our brand propositions.
4. Facilitate the alignment of all food and drink experiences to our destination brands.
5. Encourage food and drink operators to engage with Fáilte Ireland on a sustained basis.

Appendix 1: Contributing Stakeholders

- Anthony O Toole – Culinarian Press
- Aran Island Goats Cheese
- Ballymaloe House
- Bord Bia
- Bord Iascaigh Mhara
- Boxty House
- Boyles of Kildare
- Boyne Valley Food Series
- Brother Hubbard Dublin
- Burren Smokehouse
- Café Osta Sligo
- Cliffs of Moher Visitor Experience
- Craft Brewers Association
- Carton House Hotel Kildare
- Delicious Dublin Food Tours
- Dingle Cookery School
- Dungarvan Brewing Company
- Firehouse Bakery Wicklow
- Georgina Campbell Guides
- GMIT – Galway Mayo Institute of Technology
- Good Food Ireland
- Guinness Storehouse
- Holy Smoke Cork
- Irish Whiskey Association
- James Burke and Associates
- L. Mulligan Grocer, Pub Dublin
- Local Enterprise Office
- McKenna Guides
- Klaw Dublin
- Pól O Conghaile
- Powerscourt Estate
- Restaurant Association of Ireland
- Sage Restaurant Midleton
- SoolNua
- The Lemon Tree Restaurant Letterkenny
- The Olde Post Inn Cavan
- The Strand Hotel Limerick
- Tourism Ireland
- Urru Culinary Store Bandon
- Wicklow Gaol Experience

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