



What is Cultural Tourism?

Architecture Archaeology Castles & Historic Properties
Christian Heritage Clan Rallies **Crafts** Cultural Courses Ecology
Festivals Film Flora & Fauna **Food & Drink**
Gaeltacht **Gardens** Genealogy Heritage Towns Islands
Industrial Heritage **Literary Ireland** Museums & Galleries Music
National Parks & Wildlife **National Monuments** Painting Holidays
Summer Schools **Theatre** Visitor Attractions Walled Towns

Cultural Tourism, as the name suggests, is the point at which *culture*, which defines in large part our identity as a society, meets *tourism*, which is a leisure activity pursued by people with an interest in observing or becoming involved in that society.

The strategy for Cultural Tourism lies at the heart of the broader strategy for developing tourism in Ireland. This is an area with significant potential for development, taking advantage of broader themes in relation to tourist preferences and behaviours. The intent of this strategy is to provide a framework for industry stakeholders to capitalise on the many product 'building blocks' that are in place, and to develop and market cultural tourism *products* in ways that capture the imagination of the visitor.



Background Context

Ireland enjoys a rich cultural heritage that is central to who we are. This is a clear attraction for those who wish to visit Ireland and is appreciated by those who spend time here. Culture in this context is amorphous – it is broad and difficult to pin down. It includes elements that we take for granted and others view as special. It is truly in the eye of the beholder.

In 2006 Fáilte Ireland commissioned Genesis Strategic Management Consultants to review Cultural Tourism in Ireland and to develop a new strategy for the sector. As part of the exercise, the team consulted widely with service providers, tourism agencies and other bodies, within Ireland and in target markets. It also drew upon the outputs of other related projects carried out in the area by Tourism Agencies, Task Forces and other relevant bodies.

Questions to be answered as part of the study included:

- What is the **role** of Cultural Tourism in delivering on our broader national tourism agenda?
- How can Fáilte Ireland **support** other stakeholders and the industry in capitalising on Cultural Tourism to deliver on the broader national tourism agenda?
- What are the priorities for delivering on this role in terms of the offer, product development, positioning, marketing and promotion?
- Which areas of Cultural Tourism (markets, consumer segments and corresponding 'offers') represent the best opportunities for delivering sustainable growth in the near term?
- What is the action plan for how Fáilte Ireland should deploy its resources during the planning period to deliver against these priorities and opportunities?

Definition of Cultural Tourism

Culture is a concept that means different things to different people, and the range of activities potentially falling within the umbrella of Cultural Tourism is broad. The team chose the following as its working definition of Cultural Tourism for the purposes of the project.

'Cultural Tourism embraces the full range of experiences visitors can undertake to learn what makes a destination distinctive – its lifestyle, its heritage, its arts, its people – and the business of providing and interpreting that culture to visitors.'

(Commonwealth of Australia Creative Nation, 1994)

This definition was chosen for several reasons:

- It is *holistic*, and captures the full scope of activities and interests that might be pursued by tourists in this area.
- It is written from the perspective of *demand* – i.e. considering the experiences visitors can undertake – as opposed to supply.
- It reflects the importance of providing *access* for visitors to culture and also *interpreting* it in ways that are usable for the visitor.

A consequence of adopting this definition is that Cultural Tourism becomes *more* than a niche product targeted specifically at Cultural tourists. It is *mainstream*, having considerable overlap with general tourism, and being 'practiced' by most tourists to a greater or lesser extent.

Key Findings of the Review

What is presented here is a summary of the project outputs. More details can be requested from Fáilte Ireland (contact details are provided at the end of this publication).

The Market for Cultural Tourism – Internationally and in Ireland

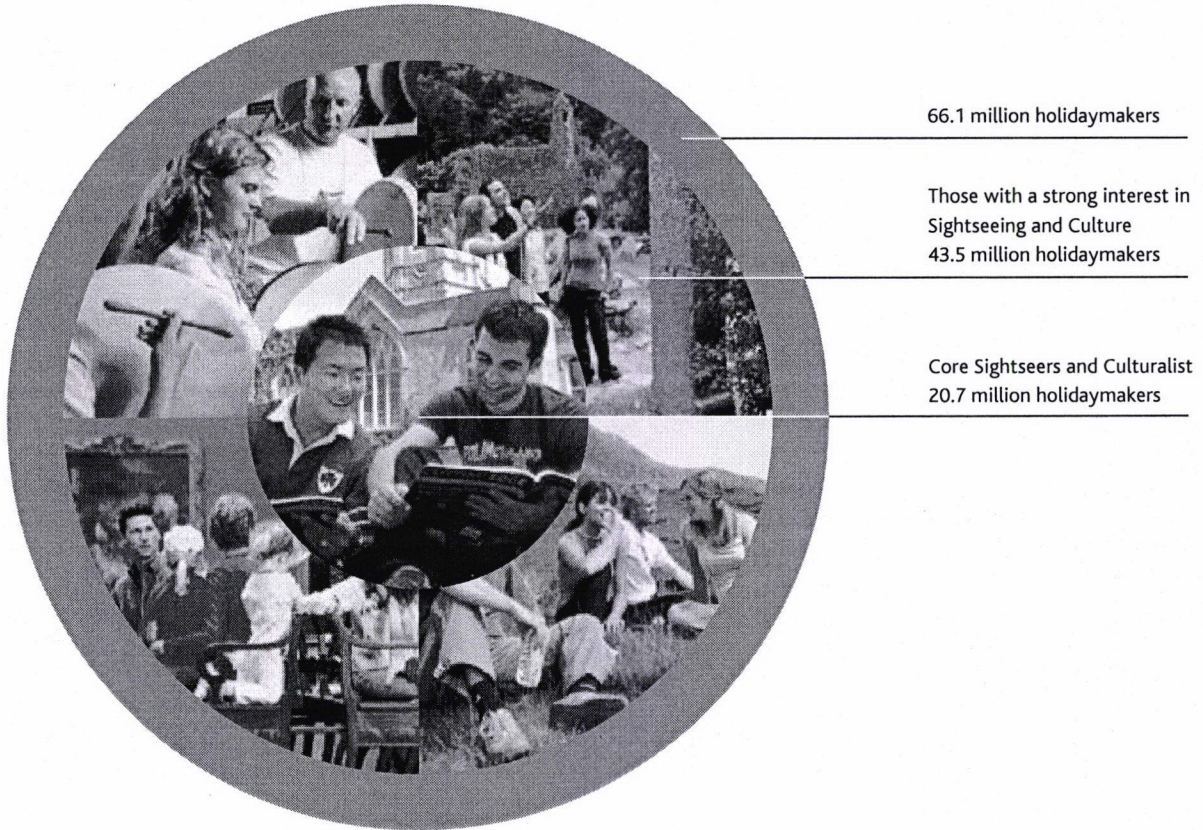
Overview

The market for Cultural Tourism depends on the definition used, however it is clearly *large* and *fast growing*. The World Tourist Organisation claims that Cultural Tourism represents between 35-40% of all tourism worldwide, and that it is growing at 15% per annum – three times the rate of growth of general tourism. Cultural tourism is estimated to be worth €5.1 billion annually to the Irish economy.

Cultural tourists fall into three broad segments, reflecting different levels of commitment to culture.

Motivated Cultural Tourists	Inspired Cultural Tourists	Incidental Cultural Tourists
The holiday is motivated by the cultural element – their interest may be specialist or general interest, and their focus might be on permanent fixtures such as architecture or transient opportunities such as a festival.	These have a strong, broad interest in Culture and Sightseeing. A large element of their holiday is inspired by the cultural opportunities associated with a destination.	These typically have another primary reason for their trip and participate in cultural activities that are in keeping with their travel plans or itinerary.

Using a similar framework, Tourism Ireland has conducted research to estimate the size of the available market for Cultural Tourism in our four main source markets of Great Britain, US, France, Germany. (The data below reflects outbound visitors from ACB1 social class who take a trip of longer than 4 nights.')



¹ Source: Tourism Ireland – Marketing Ireland Overseas, 2005

Domestic participation has a key role to play in the development of Cultural Tourism. Outside of the direct role in driving visitor traffic year-round, there are limits to the potential for overseas visitors of a vibrant cultural offering if it is not domestically successful and sustainable. It adds authenticity for overseas visitors and facilitates the creation of true 'living culture' around an experience. Irish people in general have a high level of interest in culture and heritage, with surveys estimating that 55% of Irish people on a long holiday (4+ nights) in Ireland will include a visit to a historic site.

Characteristics of Cultural Tourists

Cultural tourists cross the spectrum of age profiles, with two large segments being the young (20-29 years old) and middle-aged (39-59). Cultural tourists are demographically diverse, but on the whole economically attractive, with income levels in advance of the average for the broader population, and a bias towards individuals in professional or managerial positions. Cultural tourists seem to demonstrate higher-than-average spending while on holiday.

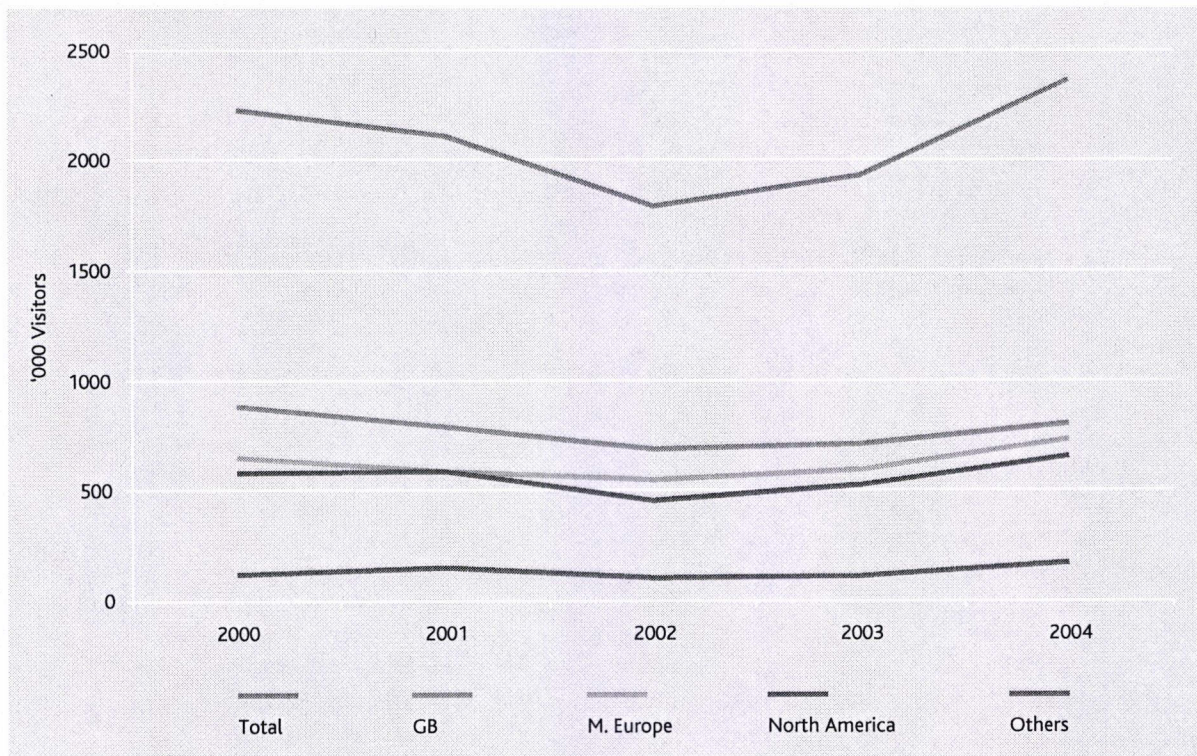
Key trends are evident in relation to changing tourist attitudes and behaviours that are important to note.

Theme	International Context
Urban vs. Rural	This is to some extent linked to the short-break phenomenon, but also reflects the concentration of cultural products and infrastructure in urban locations
Activity vs. Relaxation	Holidays have become the time to 'catch up' on cultural consumption and spend time on hobbies and interests. Research indicates that 40% of cultural 'consumption' now takes place during holiday time
Experience vs. Sightseeing	Visitors seek to <i>experience</i> a culture through learning, interacting and doing rather than passively observing the formal presentation of a culture.
Authentic vs. 'Staged'	Cultural tourists generally have a higher standard for authenticity than others and appreciate aspects of culture that are supported by the local population. That said, demand exists for both authentic and more 'packaged' forms of cultural experiences
'Soft' vs. 'Hard'	'Soft' culture (e.g. people watching, dining, socialising, etc.) – the things people do <i>around</i> their visits to 'hard' cultural attractions – is increasingly important as an element of the overall visitor experience. In many instances it is the 'glue' that binds the trip together

Demand for Cultural Tourism in Ireland

As mentioned earlier, Cultural Tourism is estimated to be worth €5.1 billion annually to the Irish economy. Data is imperfect, resulting from the breadth of the definition used, however that which is available suggests that visitor numbers appear to be recovering well from the decline witnessed in 2001 and 2002 that derived from 9/11 and also the foot and mouth crisis.

Overseas Tourist Visitors Engaging in Historical/Cultural Activities²



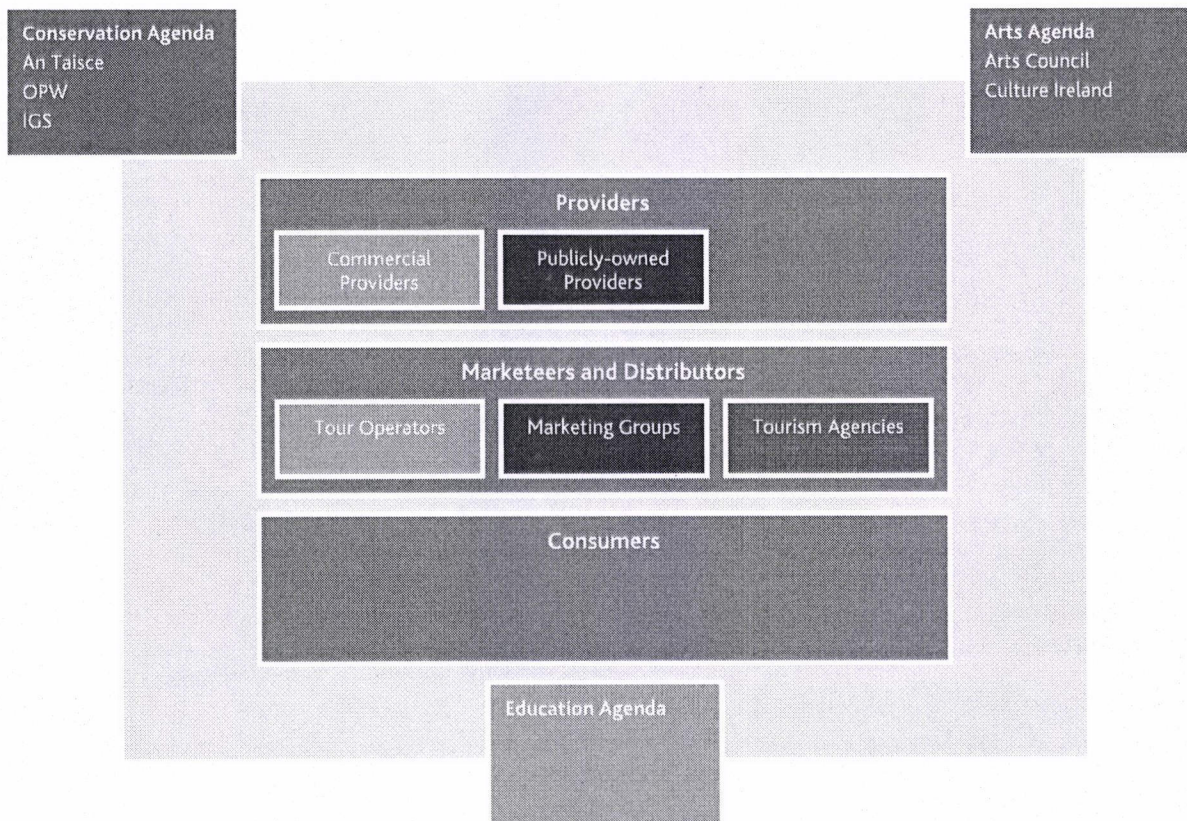
The broad themes in relation to the characteristics of Cultural Tourists and their evolving attitudes and behaviours outlined in the previous section are true also for visitors coming to Ireland.

² Visiting a historical house, garden, monument, museum, heritage centre, art galleries or gardens. Fáilte Ireland 2005

The Supply-Side of Cultural Tourism in Ireland

The supply-side of Cultural Tourism in Ireland is diverse and complex. Members of this 'ecosystem' range from commercial marketing groups to small, short-lived providers of performing arts, from not-for-profit institutions (e.g. National Cultural Institutions) to large commercial or semi-commercial institutions (e.g. Guinness Storehouse, St. Patrick's Festival, Bunratty), from institutions involved with tangible facilities (e.g. museums, theatres) to others involved in the organisation and delivery of festivals and events (e.g. Cork Jazz, Waterford Opera, etc.).

The system also includes some stakeholders whose primary interest lies outside tourism – for example in the Arts or the Environment – and others for whom tourism development is the sole purpose – for example tourism agencies (Dublin Tourism, Fáilte Ireland). This diversity is important to acknowledge as it results in vastly different attitudes towards, interest in, and objectives for tourism that pervade across the spectrum of institutions involved.



Also in the ecosystem are other providers of ancillary products and services – e.g. providers of accommodation, food and drink, transport, etc.. These play no direct role in the provision of cultural tourism but they benefit from the presence of tourists – garnering in some instances up to 66% of visitor expenditure.

Providers and Ireland's Cultural Tourism Product

Ireland has a lot of Cultural Tourism 'product'. A product audit completed for the development of Fáilte Ireland's Tourism Product Development Strategy (NB this was published *after* the finalisation of the Cultural Tourism strategy, but *before* the drafting of this summary), identified c. 4,800 individual 'products' that are relevant to Cultural Tourism in the country³. These cover the following categories:

- Urban Culture (346 products).
- Rural Culture (592).
- Heritage (648).
- Historic or private houses to visit or stay in (185).
- Genealogy (34).
- Arts and Events (1,893).
- Gastronomy (1,555).

There is no question but that Ireland's product portfolio is rich and diverse, capturing the social and cultural development of the country in modern times and far back into our history. That these products for the most part lie within easy physical reach of each other serves to add to the visitor appeal. The 'quality' of this product, however, is highly variable. The same audit set out to rate individual products on criteria of quality and 'readiness for the market', and scores ranged from 78% for historic properties in which to stay, to 56% for Heritage, with an average of 67%.

³ Source: Fáilte Ireland Tourism Product Development Strategy, 2007-2013. Note geographical scope includes Republic of Ireland plus those parts of Northern Ireland that form the hinterland of key tourism areas in the Republic

A note on Festivals and Events

Fáilte Ireland manages the Festivals and Cultural Events Initiative, which has been running for over 5 years. Through this time they have provided more than €16m in funding to 400 individual festivals and events around the country – a portion of which has gone to marketing.

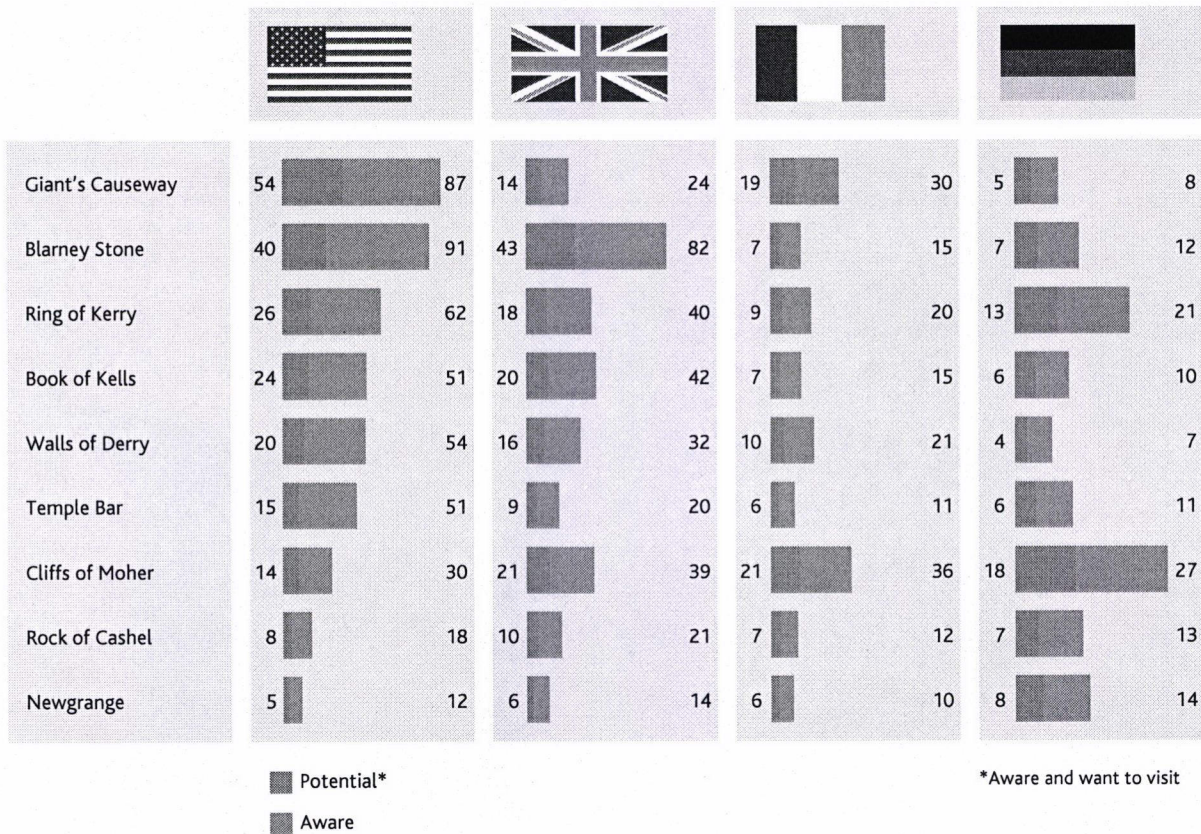
Festivals and events are an important element of the Cultural Tourism 'package'. They offer the tourist additional reasons to visit a place over and above the regular cultural product offered. As a result they can be the key factor in the tourist's decision to choose one destination over another. Furthermore many festivals and cultural events take place in both large towns and small villages that might not of themselves feature on the cultural tourism 'maps' of many visitors.

Examples that illustrate the range of Festivals and Events that have been funded and developed under this initiative include the Galway Arts Festival, Spraoi – the Street Theatre Festival in Waterford, the West Cork Chamber Music festival in West Cork, and the Johnny Keenan Banjo Festival in Co. Longford.

Awareness of, and interest in our Cultural Tourism product is also highly variable. Research conducted by Tourism Ireland shows that even some of our most iconic Cultural Tourism destinations are not well understood by our potential visitors.



Awareness/Interest in Iconic Cultural Tourism Locations⁴



In general, the perception is that Ireland has 'less' of an offering in this area than (say) the United Kingdom or France. Visitors contemplating these latter destinations can easily visualise spending time visiting stately homes and chateaux. In the case of potential visitors from Great Britain there is a further barrier to be overcome in that there exists in some instances a perception that Ireland's culture is 'quite similar' to that which they have at home and that few new experiences are available.

⁴ Tourism Ireland – Marketing Ireland Overseas, 2005. NB. 'Potential' implies that the visitor is aware and wants to visit the site

Notwithstanding the ratings of the Product Audit, satisfaction rates among those who experience Ireland's cultural offer are generally high – for example 96% of visitors were either 'Satisfied' or 'Very satisfied' with their visit to a historic house, castle, museum, monument, etc.⁵, although there has been some migration from 'Very Satisfied' to 'Satisfied' over the period from 2002-05. Anecdotally, positive feedback abounds, in particular for those providers that have developed more 'experience-based' propositions.

Taken together, the team's conclusion from its analysis and discussion is that although Ireland's cultural stock may be *perceived* to be lower in quality than other countries, Ireland has more to offer than is realised by target consumers in target markets. Moreover, when delivered properly, the combination of location and experience in Ireland is truly differentiated and compelling for visitors. The team would argue, however, that there is a lot of scope for improved product development to drive and cope with improved demand for cultural tourism in the future.



⁵ Fáilte Ireland Survey of Outbound Travellers (SOT) 2005

Marketers and the Marketing of Ireland's Cultural Tourism Offer

Once again, there are many stakeholders in the marketing of Cultural Tourism in Ireland, including individual providers and their representatives, marketing groups (e.g. Houses, Castles and Gardens of Ireland, Heritage Island, etc.), tour operators and tourism agencies.

Individual providers of Cultural Tourism go to market through combinations of some or all of the above. Many are members of more than one marketing group, most of which tend to be organised in silos, being a route to market for comparable locations and institutions.



Roles of the Tourism Agencies

At national level, the agencies' roles in marketing Cultural Tourism are through the Destination Marketing and Product Marketing programmes.

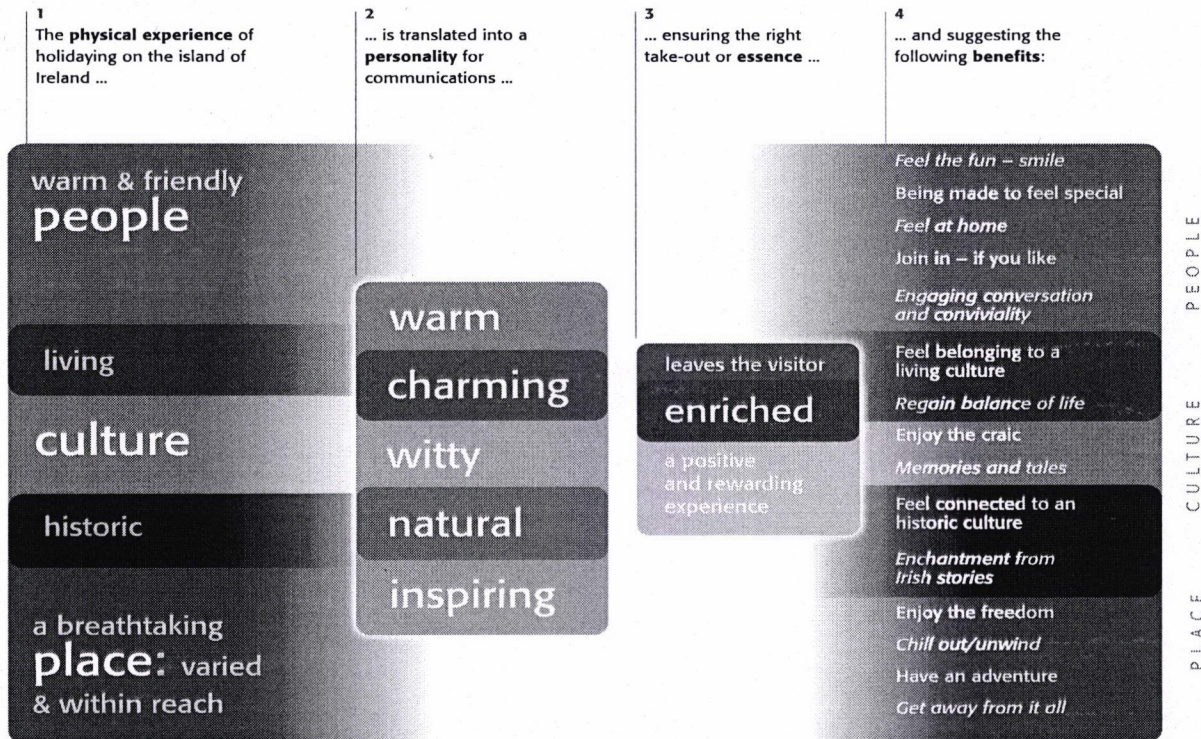


Destination Marketing

Tourism Ireland manages destination marketing for the island of Ireland with a budget of €64 million in 2005. Over the period 2005-06 the agency conducted a major overhaul of its destination marketing campaign, reflecting the outputs of market and consumer research carried out in the UK and other 'core' markets. The new campaign has Sightseers and Culture seekers as its key target audiences and has built a brand positioning around the concept of 'Discover your own Ireland' that challenges visitors to explore and find Ireland's 'hidden cultural and heritage gems'. The brand is also built around Ireland's people and their characteristics, and so the promise it makes is highly experiential and consistent with the notion of 'Living Culture'. Marketing activity under this campaign is concentrated on advertising through television, print and online media in the major markets.



Tourism Ireland – Brand Creation Framework



Product Marketing

Fáilte Ireland, on the other hand, manages product marketing for Cultural Tourism with a budget of €1.35m in 2007. Traditionally Culture & Heritage has been seen as a distinct 'product', alongside others products such as golf, angling, cruising, etc. all of which are marketed separately to their specific target markets via identified channels.

In latter years, the major component of Fáilte Ireland's product marketing investment has gone into the promotion of Gardens and Built Heritage, investing to support creation of marketing collateral and materials by providers and marketing groups, direct mail campaigns, advertising and participation at trade shows attended by aficionados in these areas (e.g. Chelsea Flower Show). As previously outlined, Fáilte Ireland also manages the Festivals and Cultural Events Initiative, and some of the funding provided under this is used to support marketing.



Observations on the effectiveness of Cultural Tourism marketing

Marketing of Cultural Tourism reflects the resources available and the diversity of interests among providers. In general it is fair to say that highly commercial institutions are rare within Cultural Tourism, and most providers operate either as small businesses or on a not-for-profit basis. Outside the large, commercial (or semi-commercial) entities like the Guinness Storehouse and Shannon Heritage, marketing teams are small and the funding available for marketing activity is low. Included in this is Fáilte Ireland – both its centre and its regional offices. The agency has traditionally operated on a shoestring when it comes to Cultural Tourism Product Marketing – in particular by comparison with the funding available to support destination marketing and even other products.

As a result, marketing of Ireland's Cultural Tourism offer tends towards the basic. For many providers, product marketing consists of building a website and a brochure and pushing out the brochure through Tourism Ireland's overseas offices. Insofar as co-marketing takes place, it is usually with other similar institutions, and is limited to those that have affiliations through e.g. membership of a marketing group. Competition among providers to get a 'bigger slice of the cake' appears to prevail as a mindset over 'co-opetition' to 'make the cake bigger for all'. Furthermore, there appears to be little interaction between Cultural Tourism providers and commercial providers of ancillary products and services – e.g. accommodation, food, drink, etc. – who have more resources and in many instances the most to gain from success.

Some changes are in the pipeline with, for example, Heritage Island moving towards a more market-led proposition that offers a selection of experiences to include festivals, arts, and performances grouped with the traditional offers of heritage buildings, museums, gardens, etc.. The selection is organised and presented to reflect and meet consumer needs.

Resulting from the fragmented presentation of the offer, it is unnecessarily difficult for prospective visitors to research, plan and organise their trips. This is exacerbated by issues of awareness and information flow – in particular in relation to existence, content and timing of short-lived performances, events and/or exhibitions of potential visitor interest. These have knock-on effects for visitor traffic, attendance at events and economic viability.

Summary

It is clear that Cultural Tourism represents a major area of opportunity for Ireland, however in many respects the focus and investment in creating compelling destination marketing themes has caused this to jump ahead of the quantity, quality, presentation and marketing of the underlying Cultural Tourism product. The need to make this system more balanced frames the key strategic challenge to be overcome to deliver on the potential of the sector.

Broadly speaking, the 'building blocks' for success are there. Ireland has a lot to offer Cultural tourists – including a range and diversity of locations, sites and experiences that is considerably in excess of what visitors might expect. Those visitors who do come and experience what is on offer tend to leave satisfied.

In addition, tourists in major markets are well-disposed to visiting Ireland, viewing culture in its broadest sense as being a major element of 'what Ireland is about'. International trends towards 'softer culture' and more authentic 'experience-based tourism' play to our strengths in this regard.

However, capitalising on the Cultural Tourism opportunity will require doing things differently to address the weaknesses in our current model.

- Product development – moving from a concentration of focus **within** silos (e.g. Built heritage, Natural Heritage, Performing Arts, etc.) to **across** silos, and from 'observation-based' ('look but don't touch') visitor experiences to something more embracing and participatory.
- Product Marketing – moving from where the presentation of important aspects of our Cultural Tourism offer often resembles 'a supermarket with the products arranged in alphabetical order' to something that is more **compelling, distinctive, joined-up and consumer needs-focused**.

The Essence of the Strategy

Reflecting the questions to be answered through this exercise as set out at the beginning, the 'essence' of the proposed Cultural Tourism strategy can be summarised as follows:

1. Cultural Tourism has a **key role** in delivering on the national tourism agenda, and the overlap between the Cultural Tourism product and our overall, national tourism product is significant. As such, this product strategy is different and pitched at a higher level than other, more specific product and activity strategies.
2. Fáilte Ireland must support other stakeholders and the industry by **leading the development and promotion** of Culture and Heritage related offerings that 'deliver on the promise' of Tourism Brand Ireland to mainstream and niche visitors in core geographical markets.
 - By '**leading development**', we mean:
 - Being a source of deep expertise and insight around the amount and nature of Culture- and Heritage-related demand.
 - Identifying 'pockets of opportunity' for culture- and heritage-related tourism activity (i.e. acting as a bridgehead between existing supply and demand).
 - Providing an ongoing stream of ideas and platforms (hooks) around which can be built products and services that capture the imagination and exceed the expectations of target consumers.
 - Creating the conditions for 'product development' to take place (i.e. forums, networks, energy, incentive, etc. – a mix of 'carrot and stick').
 - Advocating for the development/unlocking of new opportunities on the supply-side where we can innovate/improve the product/service offer and/or the visitor experience (i.e. facilities/infrastructure development, access, information provision, etc.).
 - By '**leading promotion**', we mean:
 - Providing insight into the most appropriate forums, media, positioning, etc.
 - Providing platforms and/or resources to underpin marketing efforts for products that meet the standards when the business case is clear.



Strategic Intent

The *intent* of this strategy is to:

- Allow product development and marketing in the Cultural Tourism area to catch up with the destination concepts and messages that are currently being put out in our target markets – so that visitors *can* 'discover their very own Ireland'.
- Manage the evolving destination and product themes in a more co-ordinated way.
- Help us to hit the aggressive national tourism development targets that have already been set.
- Provide a platform for improving the economic performance and sustainability of providers at all points in the system.

It should be clarified that the object of this strategy is *not* the delivery of economic performance through tourism at all costs, nor is it about realising short-term tourism gains at the expense of sacrificing Ireland's heritage or artistic integrity.

Rather it is about communicating and building recognition about the overlap and opportunities for synergy that exist between the agendas of Tourism, Arts, Culture and Heritage and Education and providing a platform for the development of sustainable, authentic, high quality Cultural Tourism – that benefits overseas and domestic audiences alike – as a result.

How this Strategy is Different

This strategy *is* different in several key aspects from that which has preceded it. These differences are best summarised as follows:

Theme	From	To
Customer Focus	<ul style="list-style-type: none"> ▪ Narrow focus on developing niche segments around Built Heritage and Gardens. 	<ul style="list-style-type: none"> ▪ Three-pronged attack: <ul style="list-style-type: none"> ▪ mainstream general tourists ▪ niche visitors where we can see a 'sweetspot' ▪ incidental visitors travelling for another purpose.
Product/Marketing Focus	<ul style="list-style-type: none"> ▪ Focus on developing and marketing selected individual products and activities in 'silos'. ▪ Living Culture is an 'exclusive' concept. ▪ Relatively few products. Product development a 'big', unwieldy exercise. ▪ Limited synergies across products. ▪ Limited connections to destination marketing themes and concepts. 	<ul style="list-style-type: none"> ▪ Focus on developing 'packaged' experience-based products across silos. ▪ Living culture is an 'inclusive' concept. ▪ Lots of products. Product development a dynamic, flexible exercise. ▪ Focus on creating and building around unifying themes and concepts. ▪ Central to implementing destination themes and concepts.
Fáilte Ireland Engagement Model	<ul style="list-style-type: none"> ▪ Reactive, somewhat detached. ▪ Provider/approver of funding. 	<ul style="list-style-type: none"> ▪ Proactive, involved. ▪ Provider of ideas, energy, leadership – the connection between supply and demand. ▪ Partner in investment.

Priorities for Delivering on the Strategy

The team identified five key priorities as follows for putting the strategy in place. These are intended to define individual streams of activity that can be carried on in parallel, relatively independently of each other.

Priority 1:
Building and communicating market insight to industry stakeholders.

Priority 2:
Developing and setting the Cultural Tourism product 'agenda' – the set of events, themes and concepts – both national and regional – on which Cultural Tourism products are built.

Priority 3:
Stimulating, facilitating and rewarding productive conversations among members of the 'supply side' of Cultural Tourism to build products consistent with these agendas that meet the needs of target consumers.

Priority 4:
Informing, and in some instances subsidising, effective marketing of Cultural Tourism products to general and/or niche visitors.

Priority 5:
Advocating for the ongoing creation and improvement of underlying Cultural Tourism assets (e.g. buildings, sites, exhibitions, performing arts, etc.) on a sustainable basis that optimises their value over the long term.

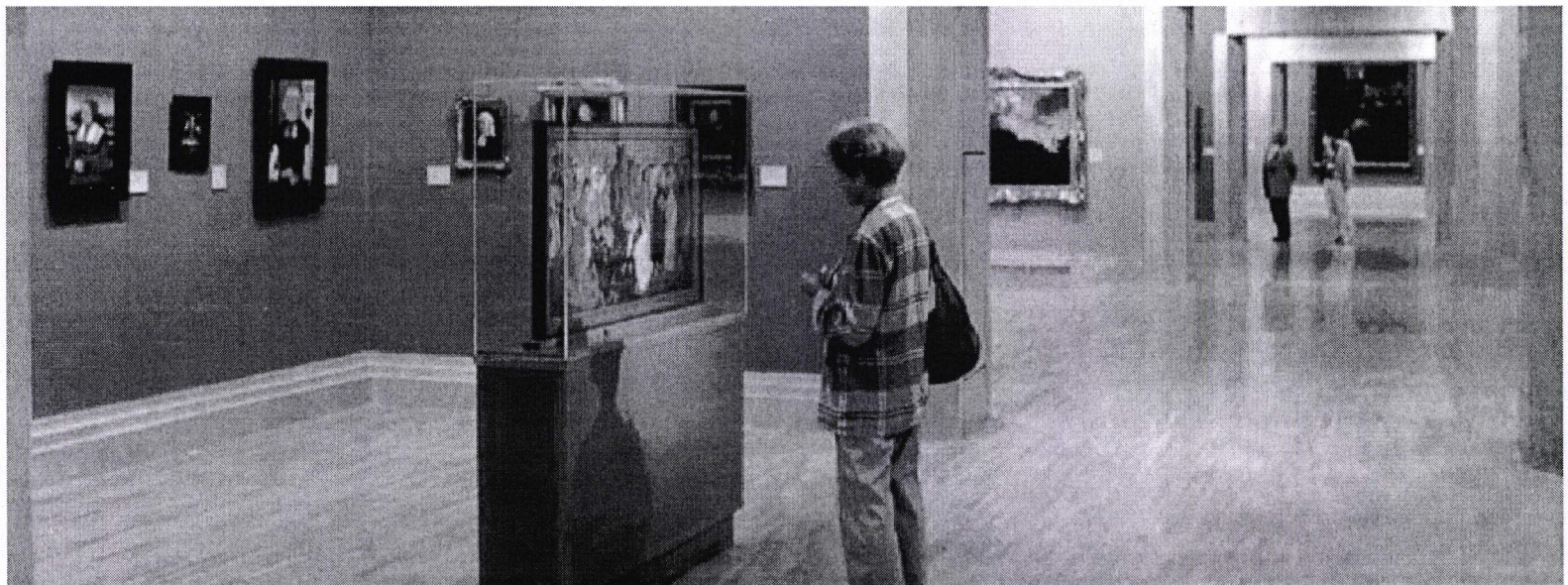
Behind each of these priorities lies a series of concrete recommendations for implementing these priorities that form the basis of the Action Plan for the Strategy.

Priorities

Priority 1: Building and communicating market insight to industry stakeholders.		
Recommendations	What does this mean?	Who needs to be involved?
1a. Implement an ongoing capability for gathering and synthesizing information about the nature and quantity of demand in our target markets.	<ul style="list-style-type: none"> ■ Fáilte Ireland becomes expert in understanding demand and best practice in Cultural Tourism. ■ The team builds the capability to systematically collect and analyse information from a diverse set of sources on customer segmentation, segment size and growth rates together with key drivers, and evolving segment needs and preferences on an ongoing basis. 	<ul style="list-style-type: none"> ■ Fáilte Ireland Cultural Tourism product team. ■ Fáilte Ireland's research team. ■ Tourism Ireland. ■ Industry.
1b. Improve measurement of quantitative and qualitative data.	<ul style="list-style-type: none"> ■ Examine the SOT data to find ways in which it can be more robust and more consistent with needs. ■ Examine other methods, e.g. data from marketing groups, ticketing systems. ■ Generate feedback from industry on qualitative issues. 	<ul style="list-style-type: none"> ■ Fáilte Ireland Cultural Tourism product team. ■ Fáilte Ireland research. ■ Marketing Groups. ■ Industry.

Priority 1:
Building and communicating market insight to industry stakeholders.

Recommendations	What does this mean?	Who needs to be involved?
<p>1c. Develop culture-specific 'e-vehicles' for sharing and discussing this information with the industry on a regular (e.g. quarterly) basis.</p>	<ul style="list-style-type: none"> ■ Initiate and maintain a regular dialogue with industry and other stakeholders that is based in facts and insight about customers, customer demand, and industry best practice. ■ Content should be oriented around trends and development in demand, evolving best practice in how demand is met, and what these insights could mean for Ireland. 	<ul style="list-style-type: none"> ■ Fáilte Ireland Cultural Tourism product team. ■ Fáilte Ireland Marketing, Research, Product Development and IT.



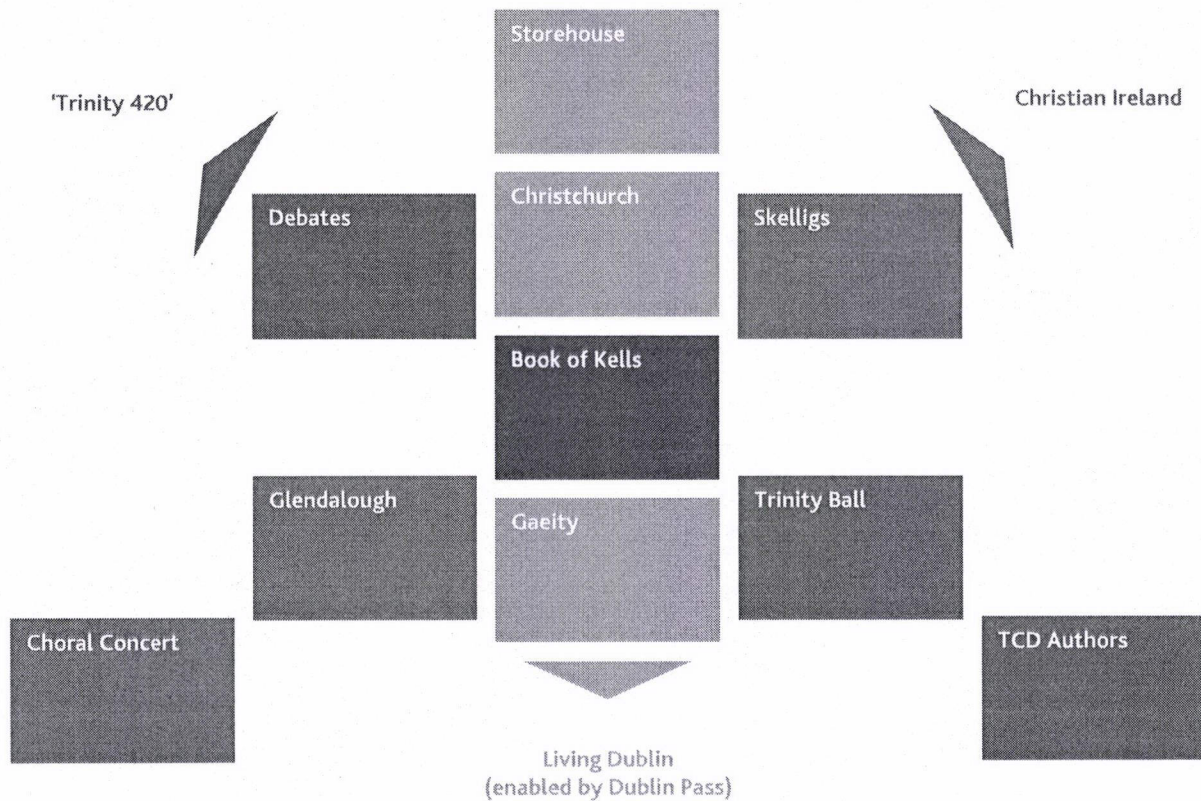
Priority 2:
Developing and setting the Cultural Tourism product 'agenda' – the set of events, themes and concepts – both national and regional – on which Cultural Tourism products are built.

Recommendations	What does this mean?	Who needs to be involved?
2a. Initiate development of a shortlist of events and 'unifying concepts' around which experience-based offers can be built and promoted.	<ul style="list-style-type: none"> ■ Create a series of events, themes and concepts – at national, regional and/or local levels, and on permanent and/or temporal bases, that can be hooks for the construction and promotion of Cultural Tourism Products that 'deliver on the promise'. ■ 'Unifying concepts' are broad 'banners' under which Cultural Tourism products present themselves to users in a way that is meaningful to them. 	<ul style="list-style-type: none"> ■ Fáilte Ireland Cultural Tourism marketing team. ■ Tourism Ireland. ■ Regional Offices. ■ Industry.
2b. Lead creation of a rolling calendar of which, how and where these events and concepts will be used over the medium-term, taking into account expected developments in local supply, and in demand in key target markets.	<ul style="list-style-type: none"> ■ Take the themes developed out of Recommendation 2a and organize into a calendar that reflects and incorporates key external events. ■ Identify international cultural events and work with the Business Tourism Unit and Irish organisations to pitch for the right to host these events. ■ Identify and approach the organisers of events that could potentially be expanded to more public and tourist friendly occasions, for example IMPAC Literary Awards. 	<ul style="list-style-type: none"> ■ Fáilte Ireland Cultural Tourism marketing team. ■ Tourism Ireland. ■ Regional Offices. ■ NITB. ■ Industry.

A Note on 'Unifying Concepts'

The creation of unifying concepts will become the basis for product development 'across silos'. For example, instead of thinking of Clonmacnoise as a standalone tourism product within the Built Heritage portfolio, it might be included in the broader theme of 'Christian Ireland' which bundles it with e.g. the National Museum, elements of the National Art Gallery's collection, and lectures about the Book of Kells.

The diagram illustrates ways in which a single underlying asset – in this case the Book of Kells – might be bundled in multiple ways to meet the needs of different target audiences.



Priority 3:
 Stimulating, facilitating and rewarding productive conversations among members of the 'supply side' of Cultural Tourism to build products consistent with these agendas that meet the needs of target consumers.

Recommendations	What does this mean?	Who needs to be involved?
<p>3a. Implement regular, themed, bespoke fora with the industry to share insights and ideas around market opportunities and to stimulate 'cross-silo' product development and marketing collaboration.</p>	<ul style="list-style-type: none"> ▪ Take on the role of organizing and leading a series of meetings on specific themes connected to the agendas developed through Priority 2. ▪ Include the providers and industry in Northern Ireland where there is a natural fit. 	<ul style="list-style-type: none"> ▪ Fáilte Ireland Cultural Tourism product team. ▪ Regional Offices and Tourism Ireland, NI tourism agencies, etc. ▪ Outside experts as appropriate. ▪ Industry.

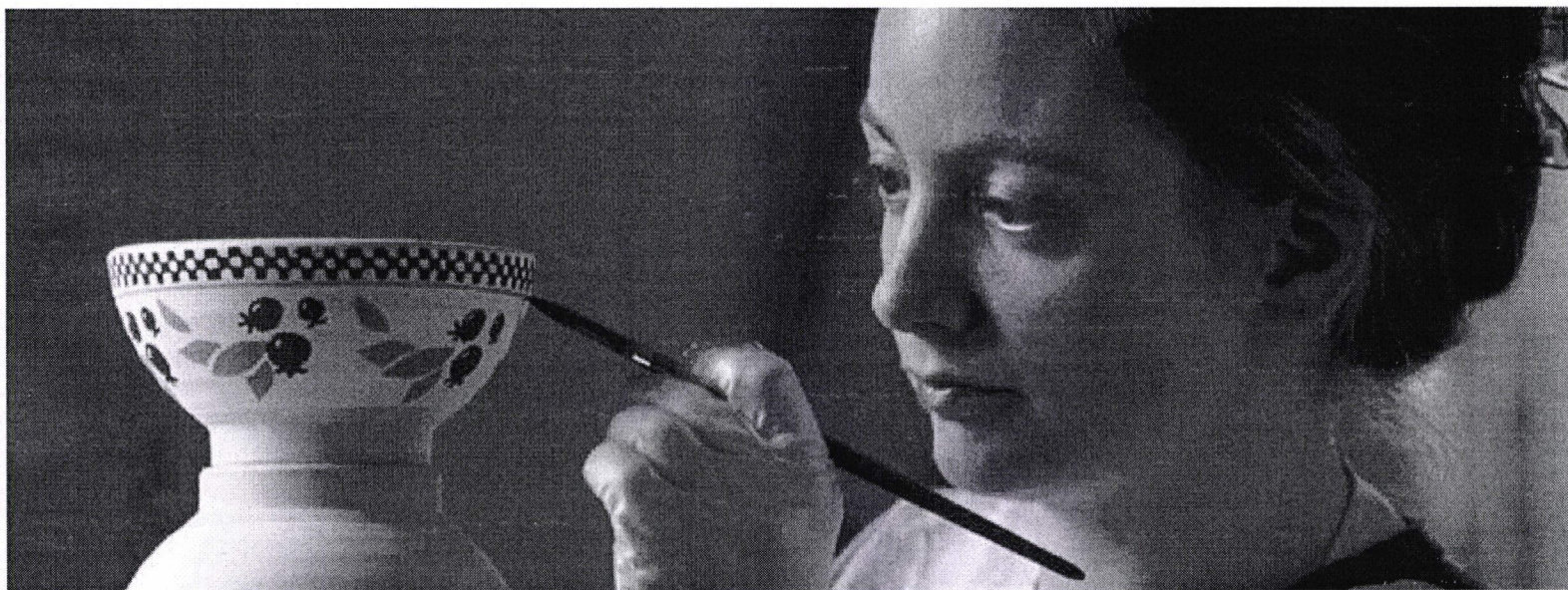


Priority 4:
Informing, and in some instances subsidising, effective marketing of Cultural Tourism products to general and/or niche visitors.

Recommendations	What does this mean?	Who needs to be involved?
4a. Change the rules for allocating Cultural Tourism marketing resources and funding.	<ul style="list-style-type: none"> ■ Reduce allocation of marketing funding to the creation of 'phone book'-type brochures produced by individual industry participants and marketing groups. ■ Prioritise marketing support for 'experience-based' offers that bundle across activities and are consistent with short listed themes and events. 	<ul style="list-style-type: none"> ■ Fáilte Ireland Product Marketing. ■ Fáilte Ireland Training Department. ■ Tourism Ireland. ■ Industry.
4b. Change the objectives and funding criteria associated with the Festivals and Cultural Events initiative.	<ul style="list-style-type: none"> ■ Incorporate Festivals programme explicitly as a means to the end of delivering on the Cultural Tourism agenda. ■ Incorporate the tiered approach put forward in the Cultural & Events Strategy. ■ Move from current reactive model of resource allocation to one that is both reactive and proactive. 	<ul style="list-style-type: none"> ■ Fáilte Ireland Product Marketing. ■ Fáilte Ireland Marketing. ■ Fáilte Ireland Festivals and Cultural Events team. ■ Festival originators and organizers.
4c. Create and oversee a single, comprehensive, searchable database.	<ul style="list-style-type: none"> ■ Replace the current arrangement where Fáilte Ireland supports the development of multiple websites and brochures with a single, comprehensive repository of information on all that there is to know. ■ It is searchable on the basis of consumer needs. 	<ul style="list-style-type: none"> ■ Fáilte Ireland Marketing. ■ Fáilte Ireland IT. ■ Regional Offices and Tourism Ireland. ■ Industry – providers and marketing groups.

Priority 4:
 Informing, and in some instances subsidising, effective marketing of Cultural Tourism products to general and/or niche visitors.

Recommendations	What does this mean?	Who needs to be involved?
4d. Work with Tourism Ireland to shape the marketing of Ireland as a destination to highest potential target segments.	<ul style="list-style-type: none"> ■ Develop processes and accountabilities to increase the role of Fáilte Ireland – particularly Cultural Tourism – in shaping destination brand strategies and marketing campaigns – to increase the fit between destination messages and the Cultural Tourism product 'agenda'. 	<ul style="list-style-type: none"> ■ Fáilte Ireland Marketing. ■ Tourism Ireland. ■ Regional Offices.



Priority 5:

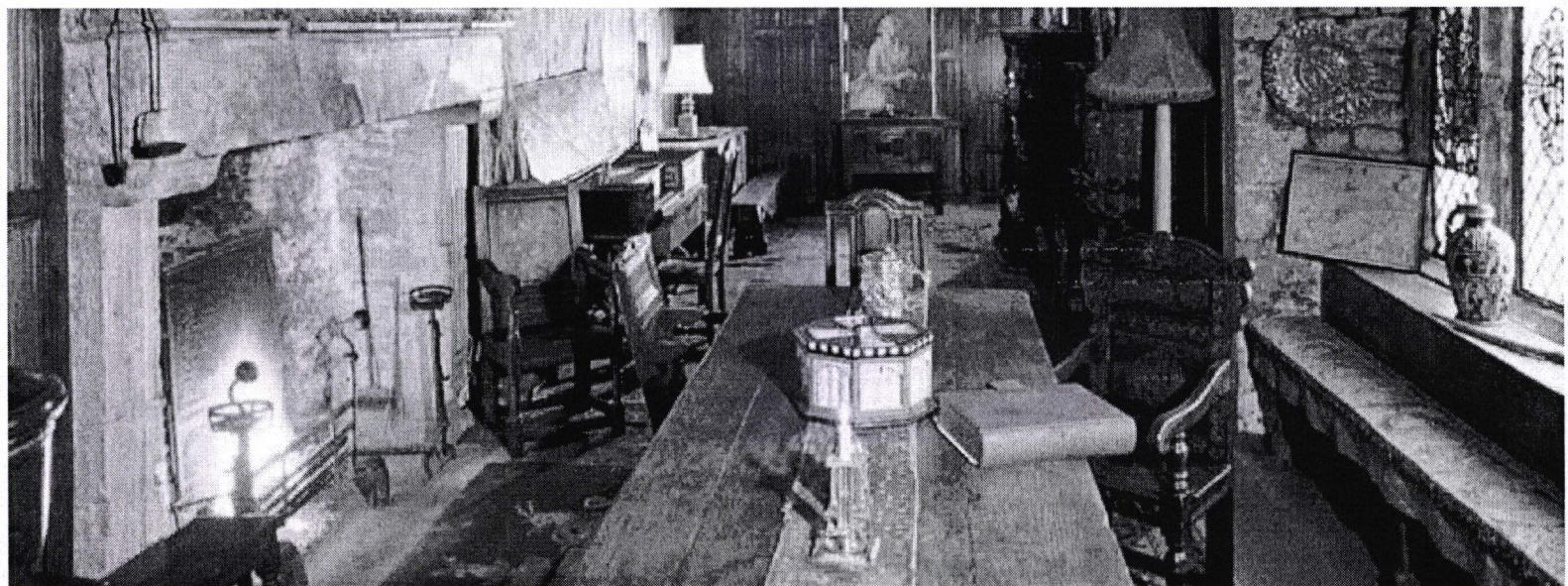
Advocating for the ongoing creation and improvement of underlying Cultural Tourism assets (e.g. buildings, sites, exhibitions, performing arts, etc.) on a sustainable basis that optimises their value over the long term.

Recommendations	What does this mean?	Who needs to be involved?
5a. Advocate for the creation of new visitor capacity in particular areas and for investment to be unlocked for infrastructural development of tourism assets.	<ul style="list-style-type: none">■ Lead the debate on where new visitor capacity/infrastructure should be developed and adapted in a way more suitable to the tourist audience – both domestic and overseas.■ Improvement of access and development of the visitor experience – including physical access, signage, intellectual access and interpretation.■ Prioritise based on agreed 'calendar' of Cultural Tourism themes – per Recommendation 4.	<ul style="list-style-type: none">■ Fáilte Ireland.
5b. Work through the Department of Arts Sports and Tourism to create increased focus, incentive and investment by the Office of Public Works in unlocking the tourism potential of the assets they control.	<ul style="list-style-type: none">■ Lobby to create secure increased awareness and consideration of tourism as a driver of investment, resource allocation and behaviour on the part of the OPW.■ Advocate for the incorporation of the OPW as a key stakeholder in the development of Cultural Tourism.	<ul style="list-style-type: none">■ Fáilte Ireland.■ Department of Arts Sports & Tourism.■ OPW.

Priority 5:

Advocating for the ongoing creation and improvement of underlying Cultural Tourism assets (e.g. buildings, sites, exhibitions, performing arts, etc.) on a sustainable basis that optimises their value over the long term.

Recommendations	What does this mean?	Who needs to be involved?
<p>5c. Create a 'radar' of desirable locations currently in other state and/or private ownership and 'pitching' the case for conversion of these assets for tourism use when they become available.</p>	<ul style="list-style-type: none"> ■ Build a long-list of desirable locations – elements of our built (or natural) heritage, but not currently available for tourism purposes, that would have tourism potential. ■ Build proposals that illustrate the potential offered by these sites if made available for tourism use. ■ Lobby the case for tourism access to these sites as and when they become available. 	<ul style="list-style-type: none"> ■ Fáilte Ireland Cultural Tourism team. ■ Fáilte Ireland Product Development and Marketing teams. ■ Other Departments/Agencies as required.



Target Markets for Cultural Tourism

Priority 1 above outlined a need for Fáilte Ireland to develop a workable, needs-based segmentation of consumers in its target overseas and domestic markets, and to build the capability to gather and synthesise information about the nature and quantity of demand in those segments on an ongoing basis. This forms a platform for the development and promotion of products that effectively meet the needs of consumers in those segments that we deem to be most attractive.

Building on their research and consultation, the team set out a point-of-view as to which consumer segments represented particular opportunities for focus and development. The grouping of these opportunities reflects the segmentation framework set out at the beginning of this summary.



Motivated Cultural Tourists		
The Special Interest Tour Group		
Target Segment	Needs/Preferences	Opportunities for Bundles
Special Interest Tour Group from Overseas – a tailored holiday group with interest in culture that is a specific 'reason to visit'.	Packaged tour with educational elements. Special access and depth of detail.	Operators with niche expertise in (for example): <ul style="list-style-type: none"> ■ Christian Heritage ■ Musical/Marching Bands/Choral ■ Horticultural ■ Architecture/Stately Homes ■ Clan gatherings, etc.
Educational Tour Groups from Ireland	Curriculum related tours – history, geography, civics.	Natural History Themed day trips – such as Fossil tour at Natural History Museum and visit to Phoenix Park.
The Special Interest Independent Traveller		
Target Segment	Needs/Preferences	Opportunities for Bundles
Gastro-Tourists	Special access and depth of detail in their chosen area of expertise.	High quality accommodation and restaurant options following themes such as the Winegeese Tour.
Garden Fans		Publicly accessible and opportunity to join special tours as part of themed itinerary such as Georgian Gardens of Ireland.
Built Heritage		Themed heritage tours e.g. Viking Tour, Dean Swift Tour.
Natural Heritage		Geoparks of Ireland, Flora and Fauna Tours.
Event Specific including Summer Schools, educational courses, etc.		Packages around festivals with accommodation and tickets.

Inspired Cultural Tourists		
Target Segment	Needs/Preferences	Opportunities for Bundles
The Independent couple or group of friends travelling by car to multiple regions.	Seeking a connection to the culture and people of Ireland in a broad sense. Variety of attractions & things to do.	Themed driving tours itineraries with a mix of activities at all budgets, e.g. Winegeese Tour, Famine Tour. Voucher system for attractions & accommodation. Non-pub nightlife.
The young hip European visitors – couples and groups of friends checking out Ireland on a weekend or short break.	Nightlife – Guinness Storehouse while on a hop-on, hop-off tour of Dublin. Other city locations for short breaks.	TKTS type facility for evening entertainment tickets and packages, including guidance on traditional music. Local transportation and signage with discounts to attractions. Themed itineraries with discounts and info pack upon accommodation booking e.g. Shopping, Pubs, Music.
The Classic Tour Group : Pre-booked tours of middle-aged holidaymakers with perhaps some Irish links.	Most likely to visit to largest number of sites. Seeking a sense of belonging to a living culture. Most likely to claim heritage is an important part of holiday. Variety of attractions & things to do.	Themed tour groups – Astronomy through the ages, Clan Gatherings. Local connections between operator and musicians for night-time entertainment for a non-pub audience.
The Lonely Planet People aka the European Backpackers – Student or youth market on a whistle-stop tour of Ireland and other countries.	Adventurous and seeking experiences that will show them the famous Irish 'craic' and some must-see sights.. Hostels and budget hotels. Limited to travel on public transport.	Themed itineraries with budget/free activities. Paddywagon Approach to get to places you couldn't find without a car.

Inspired Cultural Tourists		
Target Segment	Needs/Preferences	Opportunities for Bundles
Domestic Family and Couples	<p>Seek new things to do in familiar places.</p> <p>High usage of cultural sites, gardens, events, etc.</p> <p>Smaller urban areas for weekends – e.g. Kilkenny, Westport.</p>	<p>Child Friendly/Family activities around a base.</p> <p>Provide rolling themes to encourage repeat visits to old favourites.</p>



Incidental Cultural Tourists		
Target Segment	Needs/Preferences	Opportunities for Bundles
<p>Social Adventurers – married without kids travelling to experience the country and its people.</p>	<p>They seek out local spots and want to understand the culture through experiences such as music, sport, rural travel.</p> <p>Looking for sympathetic and authentic cultural interpretation.</p>	<p>Driving Tours.</p> <p>Voucher system for attractions & accommodation.</p> <p>Themed itineraries with accommodation in authentic locations.</p> <p>Excellent target for regional spread.</p>
<p>Educational/Student Groups – on a cultural semester abroad or short EFL course with a varied programme of activities.</p>	<p>Seeking the European and Irish cultural experience.</p> <p>Likely to be seen in groups at must-see sites during activities organised by school or operator.</p> <p>Older students spend time in the pub during free time.</p>	<p>Student half-year or short-term 'membership' to attractions.</p> <p>Literary, Music and Pub Tours – guided, non-guided, iPod.</p>
<p>Outdoor Actives – the well-educated affluent group here for an activity holiday – golf, hiking, angling, equestrian, cruising.</p>	<p>The activity is the prime motivator – culture is secondary.</p> <p>Accommodation and itinerary revolves around activity.</p> <p>Cultural Tourism options at night and where close to activity base.</p> <p>Activities for others travelling with the party.</p>	<p>Evening entertainment options.</p> <p>Other active pursuits – historic walking tours, etc. near site of activity.</p> <p>Rainy day options near site of activity.</p> <p>Gastro-golfers.</p> <p>Natural Heritage options.</p>

Making Implementation Happen

The team's sense from discussions is that there is support for this strategy from the industry, and that they view the intent, priorities and recommendations as consistent with their own agendas.

However, as already stated, driving implementation will require addressing the *leadership deficit* that has existed in this area and that has inhibited the development of industry collaboration for 'the greater good'. A key challenge will be securing the commitment to action of this hugely diverse group of stakeholders – including Fáilte Ireland (centrally and in the regional offices), Tourism Ireland, Dublin Tourism, the NITB, the broader industry and other stakeholders. Among the broader group of stakeholders are strong agendas, including conservation, education and arts, which often view themselves as being in competition with tourism.

In our view, Fáilte Ireland is uniquely positioned to address each this challenge – situated as it is at the intersection of supply and demand for Cultural tourism in Ireland. It will, however, require mobilising the collective resources of the agency – including Marketing, Product Marketing, Product Development, Training and Development teams – behind the strategy for this to succeed.

A detailed action plan for putting the strategy in place has been developed and agreed, together with guidance on the resourcing of the implementation. Full details of that plan are available in the full strategy report and are not replicated here. A precursor to 'jumping in' on individual actions, however, it will be important to ensure the conditions are established to support the implementation of the overall programme. This will require making progress in the following areas:

- Signing off on the implementation roadmap.
- Formalising the implementation team.
- Communicating the strategy.
- Enabling flexibility.
- Creating, maintaining and being seen to maintain momentum.

Relevant Contacts

Fáilte Ireland

Information regarding Fáilte Ireland's activities is provided on the website www.failteireland.ie

This includes:

- The complete Cultural Tourism Strategy.
- Information on marketing of the cultural tourism product.
- Product development initiatives.
- Research and statistics for the Cultural Tourism sector.
- Education & training programmes.
- Copies of other useful publications.

Useful contacts

National Contacts

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