

SUBMISSION ON DEVELOPING A TOURISM POLICY STATEMENT

Background

The Federation of Irish Sport ('The Federation') is the representative body of 72 National Governing Bodies and 28 Local Sports Partnerships in Ireland. The Federation welcomes the Department's request for submissions on developing a *Tourism Policy Statement*, as it has long held that Irish Sport has an important and vital role to play in the development of any future tourism policy.

The *Issues Paper* states that the purpose of the consultation process is to elicit views from interested parties *'to support a competitive and sustainable tourism industry in Ireland'*, which the Federation believes Irish Sport can contribute enormously to.

The *National Tourism Policy Review of Ireland 2004-2012* stated that Fáilte Ireland would be responsible for the *'Implementation of special initiatives to attract international sports events to Ireland and to support the marketing of festivals and cultural events.'*

Fáilte has had success in the intervening years with events such as the Volvo Ocean Race, the Youth Sailing World Championships, Tall Ships Race and the Notre Dame-Navy game all having been attracted to Ireland and indeed this year, 19 out of the 82 'Flagship Events' supported by the Gathering Fund were sports related.

All of these events have attracted additional visitors to the country and contributed enormously to the economy with as many as 35,000 Americans travelling for the college football game at the Aviva Stadium in 2012, contributing as much as €100m to the economy.

It is clear that sports tourism has a huge role to play in contributing to the growth of the tourism sector generally and if the offering is to be *'competitive and sustainable'* it is imperative that the product is right and the delivery of any policy to attract sports tourists and events is implemented in a coordinated way.

Our submission will largely centre on Heading 2: *'Tourism Product Development'* and Heading 4: *'Implementing Policy & Service Delivery Mechanisms'*, as we feel that it is these two areas that are of most relevance to our sector and which we can input most effectively on.

Heading 2: Tourism Product Development

The Federation believes that Ireland should target the development of a 'sports tourism product' which is based on the fact that-

- Sports Tourism worldwide has an estimated value of \$600 billion¹ – recognised as one of the fastest growing niches of the global tourism industry
- Sport contributes significantly already, for example;
 - €755 million is generated by Recreational Angling per annum with 150,000 visitors supporting 10,000 jobs,

¹ <http://tourism-insider.com/en/2011/05/english-sport-tourism-a-new-spin-on-an-old-theme/>

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- Overseas golf visitors generate €202 million for the Irish economy with only 21% of the spend being on 'golf-related' activities
- 149,000 overseas visitors engaged in cycling and 66,000 participated in equestrian activities in 2012, according to Fáilte Ireland research²
- There is significant potential in the domestic tourism market as well as in attracting overseas visitors. Canadian research would indicate that 38% of all domestic tourism in Canada is sports related generating \$2.6bn in spending³. Fáilte Ireland research did find that-
 - 254,000 Irish residents travelled domestically to sporting events in 2012 (up 11% on 2010) with an average overnight stay of 2 nights⁴
 - 22% of domestic holidaymakers engaged in Hiking/Walking with another 22% engaged in Watersports, whilst 9% engaged in Golf and Cycling Activities
- We feel the growth in mass participation events such as adventure racing and triathlons (now over 120 per year) as well as 5k, 10k, half marathons etc. will continue to contribute to the growth in domestic and overseas visitors.

The *Policy Statement* is to prioritise investment in areas of maximum return with '*specific, benchmarked and measureable policy priorities*'. Sports tourism and events have proven to achieve maximum return, for example-

- Visit Britain has found that a 'sports tourist' will spend on average £900 per trip compared to the £500 spend by an 'ordinary tourist'⁵
- In New Zealand, a country of similar population and natural amenities, international cycle tourists typically stayed in New Zealand for long periods, and spent significantly more on average per trip (\$3,895) than all international tourists (\$2,662)⁶
- The Canadian Sports Tourism Alliance found that the average stay for attendees at the 2013 ISU World Figure Skating Championships was 6 nights, spending \$1000/person for international visitors and \$785/person for Canadian visitors to the event, generating net economic activity of \$23.2m⁷
- Sports event tourism requires limited 'government marketing' with the event itself proving the draw and indeed, can generate marketing for Ireland if correctly developed
- The Solheim Cup in 2011 was estimated to have generated €60 million worth of marketing for Ireland⁸ which represented a good return on investment

Ireland has a good platform (and competitive advantage) from which to build our reputation both in terms of natural amenities for sport and recreation (golf, angling, adventure racing, surfing, cycling, hill walking etc) and formal sports events such as Special Olympic World Games, Volvo Ocean Race, Ryder Cup, Solheim Cup, Europa League Final and Heineken Cup Finals by way of example.

The Great Western Greenway (cycling and walking route) has also highlighted the benefit of using an existing resource (unused railway) to develop a sustainable tourism product, which will in time build

²http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3_Research_Insights/3_General_SurveysReports/Tourism_Facts_2012.pdf?ext=.pdf

³http://www.sportmanitoba.ca/uploads/SMB/sport_tourism_spending_soars_eng.pdf

⁴http://www.cso.ie/en/releasesandpublications/er/hts/householdtravelsurveyquarter22013/#.Uqnnp_mGqSo

⁵<http://media.visitbritain.com/News-Releases/Foreign-tourists-spend-2-3-billion-a-year-watching-and-playing-sport-VisitBritain-357.aspx>

⁶<http://www.med.govt.nz/about-us/pdf-library/tourism-publications/Cycle%20Tourism%20Profile%20-123KB%20PDF.pdf>

⁷<http://canadiansporttourism.com/news/skate-canada-generates-426-million-economic-activity-london.html>

⁸<http://www.failteireland.ie/Utility/Media-Centre/Solheim-Cup-to-Tee-up-60-Million-Euro-Worth-of-Adv.aspx>

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associated local economic benefits and employment. 180,000 trips are anticipated this year with 40 jobs created according to Minister Ring.

The collaboration between Fáilte Ireland, Local Authorities, the National Trails Office, the Irish Underwater Council and Canoeing Ireland in the development of the 'Blueway' along the west coast earlier this year has the potential to further develop adventure tourism in Ireland and highlights the importance of a partnership approach. Local buy-in is crucial in the sustainable development of a sports tourism product with local infrastructure necessary to sustain a national/regional policy and strategy. The Wild Atlantic Way also provides a platform to develop further adventure tourism initiatives.

The 'Dublin Decider' football game at the Aviva Stadium between Liverpool and Celtic organised by the FAI sold out in 30 minutes, with many visitors coming from the UK, highlighting the appetite for a specific sports tourism product.

We believe that the development of a specific 'sports tourism product' in partnership with (and harvesting the knowledge of) Irish Sport would contribute to the further growth in sports tourism in Ireland.

Heading 4 (Q17-Q20): Implementation of Policy & Delivery Mechanism

Currently collaboration between Fáilte Ireland & the Conference Ambassador Programme is clearly effective, with an increasing number of sports conferences being held in Ireland, for example; International Sailing Federation (2012), European Paralympic Congress (2013), International Ice Skating Union (2014) and the possibility of the International Hockey Federation (2015).

However, in respect of sports tourism generally there has been no interaction. To highlight this point, a sports tourism strategy has recently been commissioned by Fáilte Ireland and there has been no consultation with structured sport to date.

The Federation believe that a dedicated Sports Tourism Strategy is required, which should follow on from this proposed *Tourism Policy Statement*. This has happened in all cities/countries who have established a reputation as a 'sports' destination, for example; Scotland (Glasgow), Valencia, Denmark, Melbourne, Vancouver to name but a few.

We are not certain that the existing structures provide the best platform for the implementation of such a strategy when drafted. For many sports events a partnership approach is required between sport and government (be it local or national). The securing of an event is often a political process based on relationships for which, the sports body is needed. For example, a rugby world cup bid will not succeed without the IRFU engaging fully with the IRB internal political process.

International Examples

In **Denmark** a joint venture between sport and government 'Sport Event Denmark' now sees the Danes win two out of every three sports events they bid for. In the current environment in Ireland there is no appetite for a 'new' agency but some form of dedicated collaboration needs to be accommodated within the existing structures.

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Similarly the 'Canadian Sports Tourism Alliance' (CSTA) creates greater links between stakeholders and more effectively delivers their sports tourism strategy. The CSTA leverages its expertise, from the leadership of NGBs and local government to service providers and suppliers, to deliver an annual \$3.6bn sports tourism industry to Canada.

The CSTA publishes details of upcoming sports events which are available to bid for, both domestic and international, and invites sports organisations to consider bidding for them. Bids are then assessed for economic feasibility in advance using the Sports Tourism Economic Assessment Model (STEAM)⁹. Successful bids and subsequently hosted events are reviewed afterwards using STEAM which allows a readily available return on investment analysis.¹⁰

We believe that Ireland should employ a strategic approach to bidding for and hosting sports events, of a variety of scale and type, as they are proven to deliver an excellent return in investment to the state.

Conclusion

The Federation believes that-

- Ireland has a vast wealth of natural resources and facilities available to it and a history of successfully hosting national and international sports events which enables the development of a sports tourism product
- Irish Sport can help to deliver this product through a strategic approach to attracting the sports tourist and sports events
- The establishment of a dedicated sports event bidding agency to deliver on policy is preferable, however in its absence a more collaborative partnership approach between stakeholders is required

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⁹ <http://canadiansporttourism.com/steam.html>

¹⁰ <http://canadiansporttourism.com/reports/economic-impact-assessment-reports.html>