



IRELAND'S ASSOCIATION
FOR ADVENTURE TOURISM

2021 ANNUAL REPORT

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OF ADVENTURE TOURISM



INTRODUCTION

This report provides a summary of work done in 2021 by Ireland's Association for Adventure Tourism (IAAT), its Constitution and across 10 strategic areas of activity. It also points to planned steps in each area for 2022 and beyond. The 10 strategic areas are:

1. **Membership**
2. **Insurance**
3. **Standards / Guidelines**
4. **Representation & Lobbying**
5. **Infrastructure & Access**
6. **The Collaborative Network**
7. **Training & Events**
8. **Sustainability**
9. **Partnerships**
10. **Initiatives**

The past few years have been incredibly challenging for the adventure tourism sector, and indeed for the tourism industry as a whole. However, we have seen our sector come together strongly, with IAAT supporting a collaborative community

across the entire island of Ireland. It is the Association's intention to harness this community and culture to overcome any challenges that 2022 presents, whilst also seeking to drive new initiatives.



IAAT

IAAT is the representative body for adventure activity tourism on the island of Ireland, and we now have over 315 members - with approximately 290 in the south and 25 in Northern Ireland.

Members include adventure centres, tour operators and businesses of varying sizes offering everything from biking, hiking, kayaking, surfing and horse riding to name but a few - there are over 50 unique activities represented within the membership.

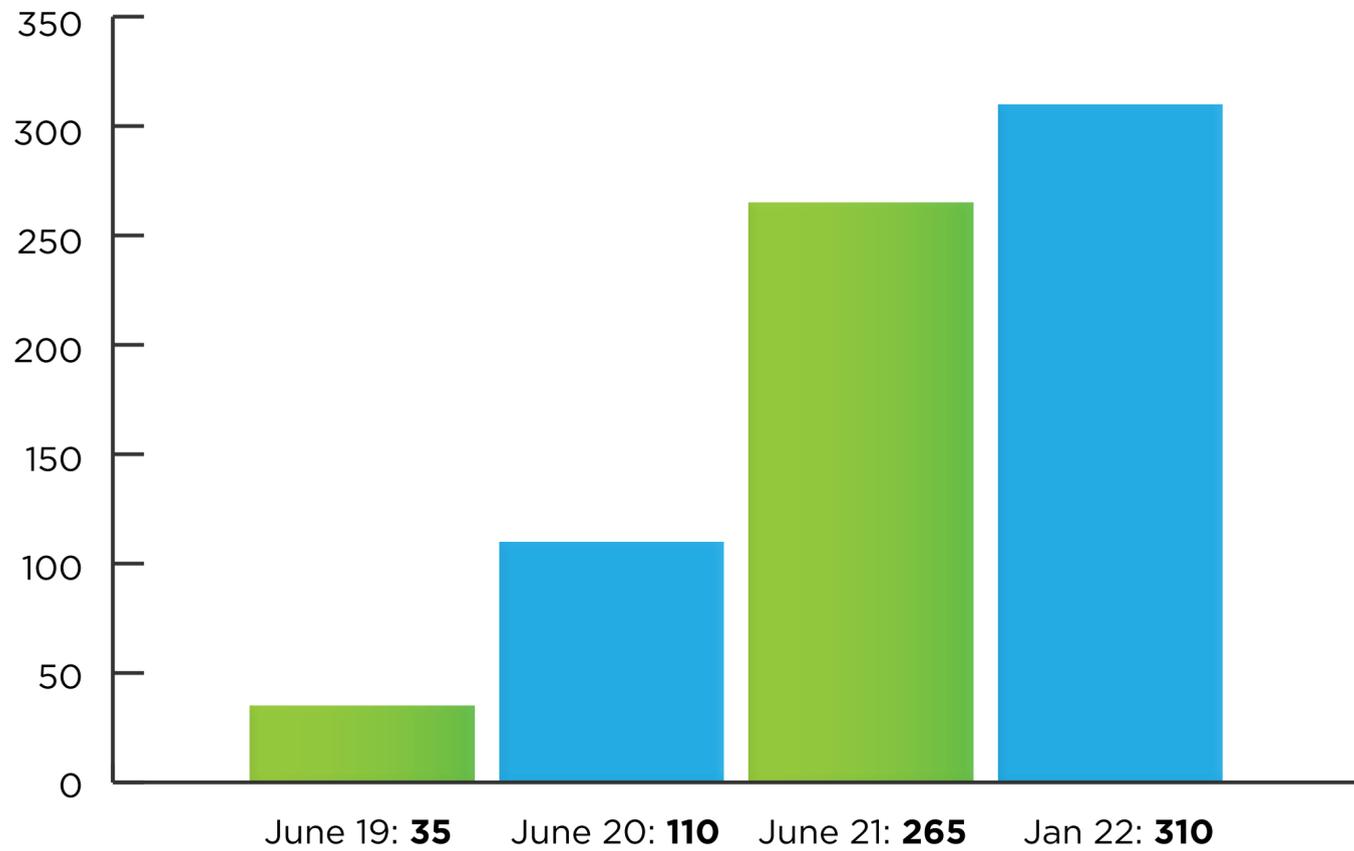
Covid-19 has seen a re-emphasis on the outdoors, and we've particularly observed a refreshing level of new interest from the domestic market, who may have not experienced adventure tourism in Ireland before.

IAAT is determined to work for members and other key stakeholders to ensure that the voice of the Irish Adventure Tourism sector is heard loudly and clearly. It remains IAAT's ambition for the island of Ireland to become a leader of adventure tourism internationally as soon as possible - in a responsible and sustainable manner.



MEMBERSHIP

In 2021, membership increased significantly, to over 300 – we now boast members in every county on the island of Ireland. This level of membership has provided the Association with a real platform to have the sector’s voice heard by key stakeholders – from senior Government to development bodies and other industry stakeholders.



Membership registration was primarily driven by a recognition of our public representation throughout Covid-19, the delivery of the insurance scheme, recognition of the benefit in being part of a collaborative group, and referrals by current members and industry bodies.

Looking to the future, we anticipate membership will continue to grow, particularly with a renewed focus on Northern Ireland where we continue to build key relationships.

With this significant growth of the Association, 2022 will also see the amendment of our current Constitution, to properly address the reality of corporate governance and how we operate.

INSURANCE

2021 was a milestone year for IAAT in our efforts to address the impact of the ongoing insurance crisis on our sector.

GROUP INSURANCE SCHEME

The long-awaited launch of a member group insurance scheme in July of 2021, in conjunction with Arachas, was as a result of a number of years of work by many people involved in IAAT and our partners.

In the first few months of the scheme, a number of operators who were unable to even get quotes for their activities, were able to get cover and re-open their businesses. To date, approximately 50 IAAT members have gone on cover through the facility, and it is expected that many more will find competitive cover through the scheme in 2022.

The global and indeed national insurance markets remain volatile, and it is the

intention of IAAT to continue to work with partners to ensure that we have sustainable solutions for members' insurance needs in what has been an extremely challenging few years.

One of the things that the Association will be doing this year is launching **supports for members around their safety management systems**. The objective of these supports – which will be delivered through a series of virtual, in-person and one-to-one sessions – is to bring consistency and quality to how we present the sector to the insurance market. Please reference the section on Standards / Guidelines for further information.

INSURANCE REFORM

Over the past few years, IAAT has endeavored to support the drive for insurance reform. This has been done through meetings with Government Ministers, Insurance Ireland, and by working closely with our partners at the Alliance for Insurance Reform. The support and contribution of members should also be noted as we finally began to see some results in 2021, with long overdue amendments to the personal injury guidelines.

However, there is still significant work ahead in ensuring that the insurance situation in Ireland is to achieve an equitable level with other EU states and our closest neighbours in the UK.

JUDICIAL GUIDELINES:

While not at a level that will bring us in line with England, Wales or indeed other European jurisdictions, the Judicial Guidelines which were implemented on the 24th of April should ultimately see reductions in premiums across the market. Notably, reforms to the Judicial Guidelines, the Garda Insurance Fraud Coordination Office and the Perjury Act, has already seen an impact in the motor insurance sector, but the Liability sector continues to see less competition, and policyholders are simply not experiencing marked decreases in premiums. This has to change.

DUTY OF CARE:

For the sake of every organisation that has physical customers, participants, recreational users or other visitors, the duty of care must be urgently rebalanced in a manner that is in the public interest; fair,

reasonable, practical, and proportionate and in the public interest.

The Cabinet Committee Sub-Group on Insurance Reform published its most recent Implementation Report in July 2021. In it, the Sub-Group reported that “The Department of Justice is working on a General Scheme to give effect to the proposals (on duty of care) and expects to bring these to Government in September 2021 for approval.” However, this General Scheme has not as yet been published and no revised timeline for its publication has been given.



STANDARDS / GUIDELINES

HEALTH & SAFETY STANDARDS / GUIDELINES

Having delivered the group insurance scheme, IAAT now continues to work with our brokers to ensure that members are supported around the aforementioned Safety Management Systems, to include health & safety processes and associated tools and documentation. This support will enable the scheme to be as successful, competitive and sustainable as

2021 saw a significant number of members seek support in addressing their insurance applications around documentation such as Safety Statements and Risk Assessments - written for how our sector operates and/or specific activities.

This requirement has led to IAAT working with a Health & Safety consultant in developing a series of adventure-specific

SMS templates available to IAAT members at no cost, and the delivery of training workshops throughout 2022 to support the successful implementation of these templates. The goal of the Association here is to ease the burden on members around delivering the relevant documentation that will satisfy the insurers.



TECHNICAL DELIVERY STANDARDS / GUIDELINES

The Association is also commencing a proactive, industry-led* development of Good Practice Guidelines for our sector, and a 'Standards' consultant has been engaged (Fiona Ryder - who has previously worked with the development of sectoral standards and guidelines in New Zealand). A dedicated member webinar will take place with this Consultant in February 2022.

Whilst it is well recognised that our sector is already excellent in delivering activities, it's vital that the industry leads out on standards and associated guidelines now to bring formality and consistency to the quality of what we do. Ultimately, this project seeks to deliver Good Practice Guidelines - as agreed by industry - that will set a benchmark for our sector to reference. There are a number of key benefits we expect to see from our work around these 'Standards / Guidelines' including:

- Ireland becoming recognised as a world leader in adventure tourism
- Healthy & Safety support will help IAAT members focus on core business
- Ensuring the sustainability of the group insurance facility

- Providing further access for members to the group insurance facility
- Helping to achieve more competitive insurance premiums into the future
- Providing consistency and quality in how we deliver activities, as defined by industry

Finally, we are thankful to Fáilte Ireland for their support of this project, with recognition for the need to support our sector in doing everything we can to address the challenges faced around access to affordable insurance - as set out in the 2020 Programme for Government.

***As part of the consultation process, all IAAT members are invited to nominate technical experts to join our Technical Working Groups to be assigned to the processes involved in each area of activity.**



REPRESENTATION & LOBBYING

With membership increasing to a critical mass of operators, it has become more achievable for the Association to represent the sector with one unified, clear and loud voice. It's important to note that our work in representing members is underpinned by data we receive from members through surveys and general feedback.

IAAT has continued to campaign around a number of key areas including:

- **Insurance Reform** (see previous section)
- **Reopening during Covid-19:** our lobbying efforts to the Department of the Taoiseach and the Department of Tourism has supported efforts to have adventure activities – particularly outdoor activities – recognised by Government in being perfectly positioned to operate safely during the pandemic.
- **Continuity Funding:** IAAT met with Minister Catherine Martin, Minister Damien English and worked closely with Fáilte Ireland regarding the Activity Providers Continuity Fund. Whilst some of the fund parameters were not to our satisfaction, it was pleasing to have a scheme dedicated to our sector.
- **Continuity Funding:** On CRSS specifically, we campaigned through media and Government channels to get access to the scheme for as many members as possible. Subsequently, we successfully campaigned for operators to be able to access both CRSS funding and the Fáilte Ireland Continuity Scheme where relevant i.e. where income streams were split between fixed premises and trade in the outdoors.
- **Operational Guidelines:** at the outset of the Covid-19 crisis, Fáilte Ireland consulted with IAAT on the development of operational guidelines for our sector. That consultation resulted in a panel of members coming together to review draft guidelines related to their area of activity. The process ultimately resulted in a more relevant and less cumbersome - but no less safe – set of guidelines for members to follow.
- **Individual member cases:** where possible, we have campaigned on behalf of individual members regarding specific issues relating to insurance, continuity funding, permits and access.
- **Cohort cases:** we continue to endeavor to represent groups of members where relevant on issues related to a specific activity.

Note that IAAT submits a quarterly return to [lobbying.ie](https://www.lobbying.ie) which is available to the public. This return is compulsory in record of lobbying of public representatives.



INFRASTRUCTURE & ACCESS

For the adventure tourism sector, access to our island's natural resources continues to be a key challenge for some areas of activity.

2021 saw the Association being invited by Minister Heather Humphreys to join Comhairle na Tuaithe (Countryside Council), an important forum in having the role of adventure tourism providers both recognised and considered.

To date, we have been attending a series of meetings and workshops around what will ultimately be the new National Outdoor Recreation Strategy (NORS). NORs is considering everything with reference to the outdoors - including access, insurance, increased participation, biodiversity, marketing and education around these areas. Comhairle na Tuaithe is attended by all key stakeholders IAAT will report later in 2022 on the progress of the Strategy.

Meanwhile, as part of a key stakeholder consultation in Northern Ireland, IAAT delivered a submission to the Department of Agriculture, Environment and Rural Affairs (DAERA) in respect of 'The provision of access for outdoor recreation in Northern Ireland'. This consultation process will continue in 2022.

Finally, IAAT has also been consulted by Fáilte Ireland on a number of occasions with regarding to infrastructural developments e.g. the development of facilities at some key surf locations along the west coast. As part of these consultations, both the Board and individual members have been consulted for their contributions.





COLLABORATIVE NETWORK

One of IAAT's key objectives has always been to, not just raise our profile within the tourism industry and sit at "top tables", but to also build real and effective collaborations or partnerships.

That objective is borne out in being invited to contribute across a variety of forums such as the aforementioned Comhairle na Tuaithe in the south, and to DAERA in the North.

We're delighted to say that 2021 also saw our CEO successfully nominated to the Board of the Irish Tourism Industry Confederation (ITIC), sitting alongside leaders from other key representative bodies (such as the Irish Tour Operators Association, the Irish Hotels Federation, the Restaurants Association, Irish Ferries and Dublin Airport Authority). ITIC is the key lobbying and research body in Ireland for the private tourism sector.

IAAT continues to work with other key partners such as Fáilte Ireland (and their regional brands), Tourism Northern Ireland,

AVEA, and third level institutions e.g. our CEO and Chair have delivered guest lectures to IT Sligo's adventure tourism module on the attractiveness in working in such a unique and vibrant sector.

In early 2022, IAAT was also invited by the Department of the Taoiseach to join the Shared Island Dialogue - around the theme of "Tourism on the shared island: Building on past success to create a sustainable future". As an all-island representative body, we are obviously well placed for this panel. We look forward to outcomes being reported by the Department along with real deliverables, particularly in respect of tourism on the island being a seamless experience for international visitors.

As mentioned with regard to insurance, we continue to work closely with the Alliance

for Insurance Reform and members of the Alliance. These members straddle the tourism industry but work across the economy and society.

In Northern Ireland we continue to work with Tourism Northern Ireland and we're currently in the process of developing a more formal arrangement here. We also continue to liaise with the Northern Ireland Tourism Alliance (NITA), who have been given fantastic representation and insights for tourism & hospitality throughout Covid-19.

In Europe, IAAT remains partnered with the European Confederation for Outdoor Employers, which gives us important access to the European Collaborative Network.

TRAINING & EVENTS

In light of Covid-19, IAAT moved all networking and training events online, which has included the delivery of well received Marketing, Insurance and Financial Planning webinars.

Our last Conference in Charleville, Co. Cork was a resounding success with almost 200 delegates in attendance over the two-day event - at a time when membership stood at a mere 65. Our 2021 Conference has been rescheduled for Wednesday 23rd (activities and networking event) and Thursday 24th (with key industry speakers, panel discussions and a practical workshop) of March 2022, with the event still taking place at the Sligo Park Hotel.

The 2022 Conference is provisionally planned to take place in Northern Ireland towards the end of the year, with further information to be announced in due course.



SUSTAINABILITY

IAAT is partnered with Sustainable Travel Ireland, and we are currently working on the development of a sustainability policy for the association.

This policy will guide the Association's sustainability principles and operations, while also setting out our commitment to support members in their own efforts around their sustainability policies and activities. IAAT will also put forward practicable actions that we as a sector can take together.

It is expected that the Association's policy will be officially launched at the Conference on 24th March 2022.

Sustainable Travel Ireland also have special rates available for IAAT members interested in commencing or continuing their Sustainability journey and learning of the benefits to certification through e.g. the Global Sustainable Tourism Council (GSTC).

PARTNERSHIPS

Strategic partnerships have been developed with key bodies and organisations including:

- Fáilte Ireland
- Tourism Northern Ireland (advanced)
- Sustainable Travel Ireland
- Leave No Trace
- The European Confederation for Outdoor Employers (EC-OE)
- The Alliance for Insurance Reform

Meanwhile, as the economy opens up again, 2022 will also see a renewed focus on the development of commercial partnerships that are of tangible benefit to the members and then also supporting the operating of IAAT.

INITIATIVES

IAAT continues to work with key partners in delivering initiatives that will drive the success of the sector. For example, we would like to see an island-wide event dedicated to adventure tourism, in a similar vein to the successful Taste the Island event that the food sector enjoyed in 2019.

We are also investigating and/or developing a number of marketing initiatives that put the adventure tourism sector front and centre in the promotion of Irish tourism in general – both domestically and internationally.

Again, it's important to note that member contributions continue to be very welcome, and we thank members who have contributed throughout 2021.

FINANCES

Having suspended membership fees in April of 2020, development funding from Fáilte Ireland allowed us to continue to operate with fees as the sector tried to get back to “normal” business. We thank Fáilte Ireland for this vital support.

From 1st of March 2022, we will reintroduce membership fees. Given the challenges members have faced in operating through the pandemic, the IAAT board has taken the decision to flatten membership fees at €150 for a period of 12 months.

As at 31st December 2021, the Association had a cash-in-hand balance of €36,391.49. During 2022, it is expected

that key expenses will include Salaries, Membership fees with Conference fees forecasts to be offset by ticket sales and event sponsorship. Professional fees will also be incurred to cover legal fees, website support and accounting fees. The Association is reviewing additional revenue opportunities through commercial partnerships and development funding.

Financial Statements as at 31/12/2020 will be emailed to all IAAT members.

OUTLOOK FOR 2022 AND BEYOND

IAAT has seen phenomenal growth in recent years at a time when the sector really needed to come together. As a community, we have proven the benefits of having a unified voice and that we are indeed stronger together.

As the tourism industry seeks to now recover from the Covid crisis, insurance and standards are two areas of work that remain a key focus of the Association, and our success in these areas will put the IAAT in good stead for the coming months and years. 2022 will also see the formulation of a comprehensive long-term strategy for adventure tourism, through consultation with members.

We're excited about contributing to the inevitable growth of the sector and to working with members in achieving this success. We now move forward in genuine confidence that the future is very bright for the adventure tourism on the island of Ireland.



ACKNOWLEDGEMENTS

IAAT would like to sincerely thank the Board of Directors and members who have voluntarily given up so much of their time, particularly to those dedicating extra hours in sub-groups that address key areas of work. In Board of Directors was as follows:

- **Maurice Whelan**, Ireland Hike Bike - Chairman
- **Shane Young**, Killary Tours/Adventure Centre - Treasurer
- **Colin Wolfe**, Connemara Wild Escapes - Secretary
- **Carina Conyngham**, Rock Farm Slane
- **Derek Binchy**, Fota Island Adventure Centre
- **Eimear Flanagan**, Away a Wee Walk
- **Maria Kennedy**, Atlantic Sea Kayaking
- **Rob Rankin**, Vagabond Tours

The Association would like to give particular thanks to its Chair, Maurice Whelan, who has helped guide us through such challenging times as we've sought to navigate the insurance crisis and Covid-19 over the past two years.

We would also like to thank all of the key partners in industry and Government who

have supported the Association's work over the past year.

Finally, IAAT thanks all members for their positivity, solidarity and contributions in 2021 and indeed throughout the Covid-19 crisis. We look forward to working closely with the community of members in 2022 and beyond.





**Annual Report compiled by
Brendan Kenny (CEO, IAAT)
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