



Irish Whiskey Tourism Strategy

FOREWORD BY MINISTER MICHAEL CREED

I welcome the launch of the ‘Irish Whiskey Tourism Strategy’. The food and drink sector has been key to Irish economic recovery in terms of export growth. It has a particular positive impact in rural Ireland and similarly, Irish whiskey tourism will play a valuable role in the future of every region across the country.

In 2016 food and drink exports reached €11.15 billion, marking continued year on year growth. Irish whiskey was a star performer, with double digit growth and record exports of €505 million.



There are a growing number of distilleries now operating across the Island of Ireland, with the potential to attract a significant number of tourists to their regions .

Each year, over 600,000 visitors pass through visitor centres to see the craft and character of individual distilleries and the stories behind famous brands. The Irish Whiskey Tourism Strategy aims to treble this to 1.9 million visitors by 2025, an ambitious target but given the exponential growth achieved by the Irish whiskey sector in recent years, and the success of the Irish tourism and food industries in championing tourist trails and food festivals, it is absolutely achievable.

Visitor centres will provide tourists with direct experiences of the craft, history, science and people behind each cask of Irish whiskey. Inclusive, all-island whiskey trails will aim to provide a world leading historical, cultural and tourism experience, embracing also our vibrant food culture.

Irish whiskey is a unique product as its all-island Geographical Indication (GI) indicates. The Irish Whiskey Tourism Strategy will facilitate a further exciting chapter in its story, while delivering new opportunities to many towns and villages across the country.

Michael Creed T.D. Minister for Agriculture, Food and the Marine

FOREWORD BY CHAIRMAN COLUM EGAN

The Irish Whiskey Strategy sets the ambitious target and the pathway for Ireland to become the world leader in whiskey tourism by 2030.

Irish whiskey tourism is booming. The number of tourists passing through the doors of Irish distilleries are expected to treble within the next ten years bringing an influx of tourists to towns across the island.

Irish whiskey is sold in 135 countries around the world and exports are expected to double to 144 million bottles by 2020. This strategy aims to build on Irish whiskey's success abroad by giving tourists the opportunity to visit the home of their favourite whiskey, and witness the passion and expertise that goes into every bottle.

By collaborating with Government and its agencies, it is our ambition to bring tourism, jobs and economic benefits to towns around the island. From start-ups to well established brands, all distilleries on this island have an important role to play in the future of Irish tourism.

Importantly this strategy takes an all-island approach to Irish whiskey tourism and will play an instrumental role in attracting tourists to the entire island. As part of this plan, distilleries around the island will come together to create the best possible whiskey tourism offering that showcases all Ireland has to offer.

Whiskey will play an important role in the future of Ireland and we look forward to making Ireland the world's number one destination for whiskey tourists by 2020. The future is bright for Irish whiskey.



Colum Egan, Chairman of the Irish Whiskey Association



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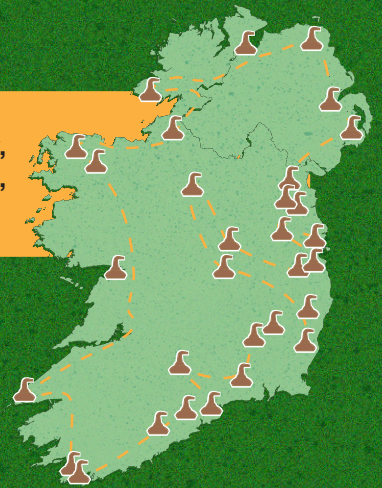
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EXECUTIVE SUMMARY



In 2013, there were four distilleries in operation and five visitor centres on the island. Now there are sixteen working distilleries, with another 15 with planning permission and many more projects at various stages of planning.

Distilleries are planned for 20 counties across Ireland, including: Antrim, Carlow, Clare, Cork, Derry, Donegal, Down, Dublin, Kerry, Kilkenny, Leitrim, Louth, Mayo, Meath, Offaly, Sligo, Tipperary, Waterford, Westmeath and Wicklow



With national and local government support, Irish whiskey tourism has the potential to grow from 653,277 visitors per annum up to 1.9 million visitors by 2025, spending an estimated €1.3 billion.

The growing success of Irish whiskey internationally and an outstanding whiskey visitor performance to date means Ireland has the potential to compete with Scotland and Kentucky to become the world's number one whiskey tourism destination.



Irish whiskey distilleries attract premium international tourists. One quarter of visitors to Irish distilleries are American – Ireland's highest spending tourists. Irish distilleries also attract significant numbers of German, British, French and other international visitors from its biggest export markets.

Irish whiskey tourism is growing significantly faster than total overseas tourism in Ireland, increasing by two thirds since 2010.



Irish whiskey acts as a premium global tourism ambassador for Ireland. It is sold in 135 markets around the world, encouraging tourists from these countries to visit Ireland.

RECOMMENDATIONS



Support the growth of Irish whiskey distilleries and visitor centres



Create an Irish whiskey trail and tourism infrastructure around distilleries



Develop an all island whiskey tourism product



Develop an embassy network of hotels, restaurants and pubs



INTRODUCTION

The Irish whiskey industry is experiencing a renaissance. Global sales have increased by over 300% in the last ten years and have been growing by double-digits since the mid-1990s.

Exports of Irish whiskey are anticipated to double to 12 million 9 litre cases by 2020 and double again to 24 million 9 litre cases by 2030 with production capacity tripling. Over €1 billion will be invested in Irish whiskey distillery projects between 2010 and 2025.

In 2013, there were four distilleries and five visitor centres on the island: that number is now sixteen working distilleries with another 15 with planning permission and many more projects at various stages of planning. These distilleries will reach across 20 counties and the majority will have visitor centres to meet the demand of Irish whiskey tourists.

With such vast growth, comes the need to understand how the Irish whiskey tourism offering can be best positioned.

If the full potential of the industry is realised, Irish whiskey tourism should triple from 653,277 visitors per year to upwards of 1.9 million visitors, spending an estimated €1.3 billion during their stay in Ireland.

To realise this potential requires a concerted and collaborative effort by industry, government and its agencies across the island of Ireland to put in place strong support systems and foundations to ensure that Ireland can offer a distinctive Whiskey tourism product with global appeal.

Scotland and Kentucky in the USA provide excellent examples of how traditionally less visited regions have developed strong whiskey-related tourism products. This shows the potential opportunity for rural Ireland to benefit from the development of Irish whiskey tourism.

This report's main objective is to create a shared vision for Irish whiskey tourism which builds on the strong fundamentals already in place and articulates how all stakeholders can best work together to drive the development of an Irish whiskey tourism product of which Ireland can be proud.

For example, it is critical that the strategy called for in this report integrates with and supports existing highly successful tourist initiatives such as Ireland's Ancient East and the Wild Atlantic Way inviting tourists on these trails to experience Irish whiskey and its heritage.

In doing so, this report recommends an ambitious yet achievable vision for Ireland to be the world leader in whiskey tourism by 2030.

Achieving this vision will require focus in four key action areas:

1. Support the growth of Irish whiskey distilleries and visitor centres
2. Develop an all island whiskey tourism product driven by government agencies
3. Create an Irish whiskey trail and tourism infrastructure around distilleries
4. Develop an embassy network of hotels, restaurants and pubs

This report seeks to complement the Irish Whiskey Association's Vision for Irish Whiskey strategy, released in 2015.

FUTURE POTENTIAL OF IRISH WHISKEY TOURISM

The number of overseas visitors coming to Ireland has grown by 41% since 2010 with visitors spending over €4.2 billion on Irish soil.

Irish whiskey tourism attracts 1,800 tourists to its distilleries every day. Since 2010, the number of tourists visiting Irish whiskey distilleries has grown by 64%, by comparison the number of tourists visiting Ireland generally has grown by 40%.

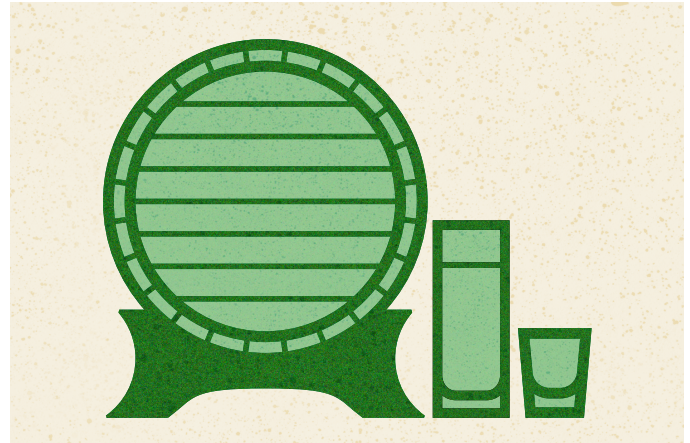
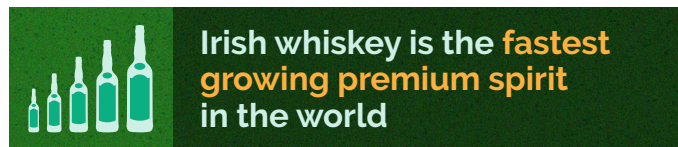


Table 1. Irish tourism and Irish whiskey tourism volumes and growth¹

IRISH TOURISM			IRISH WHISKEY TOURISM	
Overseas visitors	Volume Growth (thousand)	% Growth	Volume Growth (thousand)	% Growth
Total 2010-2015	42,349,000	40.7%	3,168,616	63.7%



¹ Irish Whiskey Association (IWA), Member Survey, June 2016

**Irish whiskey tourism is
growing significantly
faster than overall tourism**





Irish whiskey distilleries are a unique and important part of Ireland's heritage and hospitality culture helping to attract large numbers of premium tourists from across the globe to towns and communities around Ireland.

According to Fáilte Ireland the top five most important issues for tourists visiting Ireland are:²

1. Friendly, hospitable people	2. Beautiful scenery	3. Safe and secure destination	4. Good range of natural attractions	5. Interesting history and culture
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Ireland's distilleries fit perfectly with what tourists prioritise when visiting Ireland. The Irish whiskey trade is built on the passion and enthusiasm of the people working in its distilleries. They offer tourists a unique insight into our Irish whiskey making culture, an art that has been refined over generations and one that draws tourists to locations across the island.

Ireland was formerly the powerhouse of the whiskey world. At its peak in the late 19th century there were 88 licenced distilleries, producing more than 12 million 9-litre cases annually, making it the largest global spirits category of the time.

Now Irish whiskey has the potential to claim back this title and simultaneously make Ireland the world's number one whiskey tourism destination.

Irish whiskey tourism is growing significantly faster than overall tourism

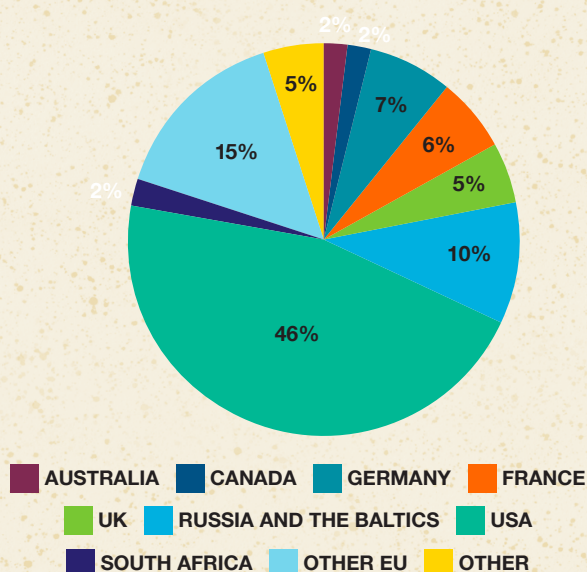
Growth in tourism 2010-2015

40.7%
Irish Tourism

63.7%
Irish Whiskey Tourism

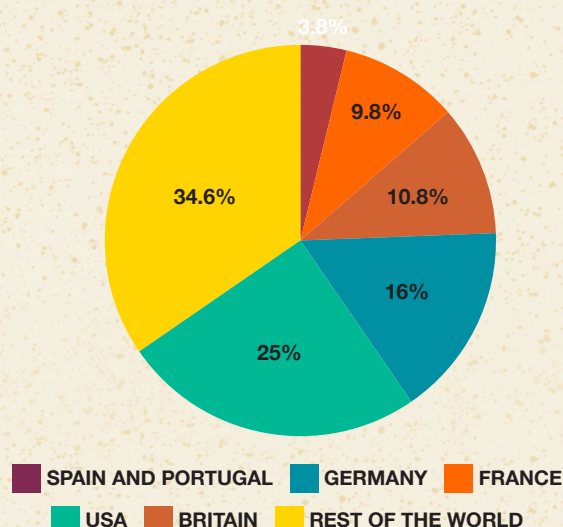
² Fáilte Ireland, The Visitor Attitudes Port Survey 2015

Irish whiskey export markets



Irish Whiskey Association, Vision for Irish Whiskey, 2015

Irish whiskey tourist nationality



Irish Whiskey Association (IWA), Member Survey, June 2016

WHERE DO IRELAND'S WHISKEY TOURISTS COME FROM?

Overseas visitors come from Irish whiskey's main export markets, attracting especially high volumes of US, German, British and French tourists. One quarter of all visitors to Irish distilleries are from the US, which is also the largest export market for Irish whiskey.³

With the exception of Russia and Baltic countries, Irish whiskey's largest export markets are the United States, Germany, France and the UK and this is reflected in Irish distillery visitor numbers.

Internationally Irish whiskey sells into over 135 different markets with the top five markets into which Ireland exports whiskey (France, UK, Germany, Russia, US) accounting for almost three-quarters of these exports.⁴ Therefore there is an excellent opportunity to attract additional tourists to Ireland using Irish whiskey as the anchor.

Tourists from the United States are widely regarded as Ireland's most valuable visitors. According to Fáilte Ireland Chairman Michael Cawley they "stay longer and they spend more, in general, when they come a longer distance."⁵

US tourists spend more per night than any other nationality and account for a quarter of the total spend by overseas visitors. In 2015 North American tourists spent €1.2 billion during their time in Ireland.

Table 2. Overseas visitor expenditure⁶

Overseas visitor expenditure (by nationality)	Per night, per tourist	Total spend
North America	€102.68	€1,197 m
Australia and New Zealand	€78.55	€200 m
Germany	€66.43	€397 m
Great Britain	€63.66	€971 m
Other countries	€56.62	€283 m
Other Europe	€55.80	€771 m
Italy	€55.42	€153 m
France	€54.34	€236 m
All countries	€68.57	€4,208 m

³ Irish Whiskey Association (IWA), Member Survey, June 2016

⁴ Irish Whiskey Association, Vision for Irish Whiskey, 2015

⁵ Fáilte Ireland's Chairman Michael Cawley, 11th January 2016

⁶ Central Statistics Office TMA09: Overseas Trips (incl. Expenditure) to Ireland by Area of Residence, Year and Statistic



Irish whiskey distilleries have the potential to create one tourism job for every 55 international tourists they help attract to Ireland

The number of people directly employed in the tourism segment of distilleries is expected to triple from 160 to 582 direct employees by 2025⁷. Irish whiskey production is a non-footloose manufacturing industry thereby ensuring Irish jobs are not only created but must remain on the island of Ireland.

In the wider community, Irish whiskey distilleries have the potential to create one tourism job for every 55 international tourists that it helps attract to Ireland.⁹

Traditionally tourism in Ireland has relied heavily on visitors from Great Britain. Over 40% of visitors to the Republic of Ireland and two thirds of visitors to Northern Ireland are British.¹⁰

The volatility of sterling following the UK's decision to leave the EU has made Ireland more expensive for tourists from Great Britain, which has the potential to harm traditional tourism flows into Ireland.

Financial institutions estimate that visiting the Republic of Ireland could cost tourists from Great Britain between 15% and 23% more as sterling falls, which could have a major impact on visitor numbers.¹¹

Table 3. Top five countries tourists visit from⁸

Visitors to Ireland (overall)	Visitors to Irish whiskey distilleries
1. Britain	1. US
2. Other Europe	2. Germany
3. US/Canada	3. Britain
4. Germany	4. France
5. France	5. Rest of World

Irish whiskey tourism could be part of Ireland's Brexit strategy to counteract any potential decline in British tourist numbers by attracting additional tourists from other markets where Irish whiskey sales are growing. The profile of Irish whiskey tourists could help to insulate Ireland from tourism losses as a result of Brexit.

⁷ Irish Whiskey Association (IWA), Member Survey, June 2016

⁸ Central Statistics Office TMA09: Overseas Trips (incl. Expenditure) to Ireland by Area of Residence, Year and Statistic

⁹ Fáilte Ireland, Irish Tourism Can Double Revenue to 8 Billion Euro and provide for 300,000 Jobs by 2030, Press Release 01 March 2016

¹⁰ Central Statistics Office, Visitors to Ireland and Northern Ireland 2014: A Statistical Profile of Tourism

¹¹ Sterling was worth €1.30 prior to Brexit, but Barclays have forecasted that it will reach parity with the euro.

IRISH WHISKEY TOURISM FORECAST

According to the Irish Whiskey Association member survey, Irish whiskey tourism has the potential to triple within the next ten years.

1.9 million tourists are expected to pass through the doors of Irish whiskey distilleries by 2025, spending €1.3 billion over the course of their stay. In order to achieve these ambitious but achievable targets, full implementation of an Irish whiskey tourism strategy is required.



Table 4. Tourist Visits to whiskey visitor centres¹²

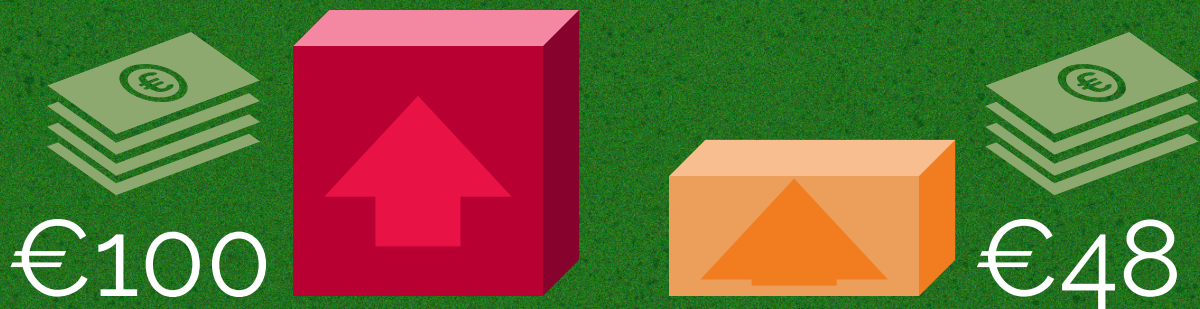
	2015	2020	2025
1 Tourist Visits to whiskey visitor centres	653,227	1.39 million	1.94 million
2 Whiskey visitor total spend during visit to Ireland	€449.6 million	€962.9 million	€1.337 billion
3 Direct employment in Irish whiskey tourism	160	421	582
4 Distillery turnover from tourism	€18.9 million	€45.8 million	€69.7 million

¹² Irish Whiskey Association (IWA), Member Survey, June 2016. Spending is calculated on CSO average spend by nationality and the proportion of whiskey tourists by nationality. Central Statistics Office TMA09: Overseas Trips (incl. Expenditure) to Ireland by Area of Residence, Year and Statistic

1.9 million tourists are expected to pass through the doors of Irish whiskey distilleries by 2025



Every €100 spent by the whiskey sector in Ireland generated an additional €48 in the economy



As visitor numbers increase so too will the number of people directly and indirectly employed by the Irish whiskey tourism industry. If the projections of the survey are realised, the number of people directly employed in the tourism parts of Irish whiskey distilleries is expected to triple in coming years, growing from 160 to 582 direct employees by 2025.

The Irish whiskey tourism industry is potentially very lucrative with distilleries estimating that they will generate revenues of approximately €70 million from the tourism element of their business by 2025.

The growth of Irish whiskey sales abroad will continue to draw increasing volumes of tourists to Irish distilleries, but if the sector is to reach its full potential it needs to be supported by a dedicated joined up Irish whiskey tourism strategy.



CASE STUDY: IRISH WHISKEY DOMESTIC ECONOMIC IMPACT¹³

The Irish whiskey industry supports 5,000 jobs across Ireland. Tourism, agriculture, utility and services industry jobs depend on Irish whiskey production and its continued growth.


The success of Irish whiskey is having a knock on effect throughout the country generating an

estimated €350 million in indirect expenditure per annum.

For every €100 spent by the sector in the domestic economy another €48 in expenditure was generated elsewhere in the economy.

By itself, the industry directly employs 748 people, with exports of over €400 million and a direct annual domestic spend of €237 million.

¹³ Irish Whiskey Association, Vision for Irish Whiskey, 2015

A photograph showing a dense stack of wooden whiskey barrels in a distillery warehouse. The barrels are arranged in rows, supported by wooden racks. The wood is aged and shows some staining. A wooden plank with the date '05/12' is visible across the middle of the stack.

**Supporting the development
of distilleries and visitor centres
will create jobs, generate
revenue and attract tourists**



Vision

To become the world's leader in whiskey tourism by 2030 the industry must work with Government and local communities to drive the development of an Irish whiskey tourism product of which Ireland can be proud.

Ireland already has a strong Irish whiskey tourism offering, but it must work with national and local stakeholders to reach its full potential.

Achieving this vision will require focus in four key action areas:

- | | | | |
|---|--|---|---|
| 1. Support the growth of Irish whiskey distilleries and visitor centres | 2. Develop an all island whiskey tourism product | 3. Create an Irish whiskey trail and tourism infrastructure around distilleries | 4. Develop an embassy network of hotels, restaurants and pubs |
|---|--|---|---|

1. SUPPORT THE GROWTH OF IRISH WHISKEY DISTILLERIES AND VISITOR CENTRES

Ireland must strive to make the most of its whiskey heritage. Irish whiskey is a leading part of Ireland's ancient heritage of which we should be justly proud.

It is one of Europe's oldest spirits and it has been distilled in Ireland since the 6th century. At its peak in the 19th century Irish whiskey was the world's largest spirits category. 88 licenced distilleries falling to just two by the mid 1980s.

Growth in the sector has dramatically increased over the last ten years. Further support is needed if new and existing distilleries are to thrive and if the industry is to meet its targets and realise its potential.

Supporting the development of distilleries and their visitor centres will not only help to preserve an ancient craft and restore Ireland's standing in the whiskey world but it will create jobs, generate revenue and attract large numbers of tourists to towns and villages across Ireland.

In Scotland one in five people are employed either directly or indirectly by the whiskey industry. The industry exports over 90 million 9-litre cases adding

over £4 billion to the Scottish economy every year. These figures show the potential economic benefit of the Irish whiskey sector to Irish economy, if it realises its full potential.

There are 118 distilleries dotted around Scotland drawing whiskey enthusiasts to regions they might not have otherwise visited and helping to create jobs in smaller towns around the country. The creation of an Irish whiskey trail would lead to a similar potential for Ireland.

In Kentucky employment in the Bourbon sector has grown by nearly a quarter since 2010. The industry is dependent on local grain supplies, supporting 1,360 farm jobs in Kentucky. Distillery investments are also helping to create 1,470 jobs in construction and equipment purchases in the locality.

Irish whiskey tourism is already performing exceptionally well with an average of 59,000 visitors per annum per visitor centre in comparison with 27,000 visitors in Scotland.

The success of the Scotch and Bourbon sectors demonstrates the potential of whiskey distilleries to generate further revenue and employment in Ireland with fulsome support from Government and the rest of the tourist trade.

Ireland must capitalise on the growing success and popularity of Irish whiskey abroad by supporting the development of world-class distilleries. This will help to create jobs in Ireland and solidify Irish whiskey's reputation as a premium product.

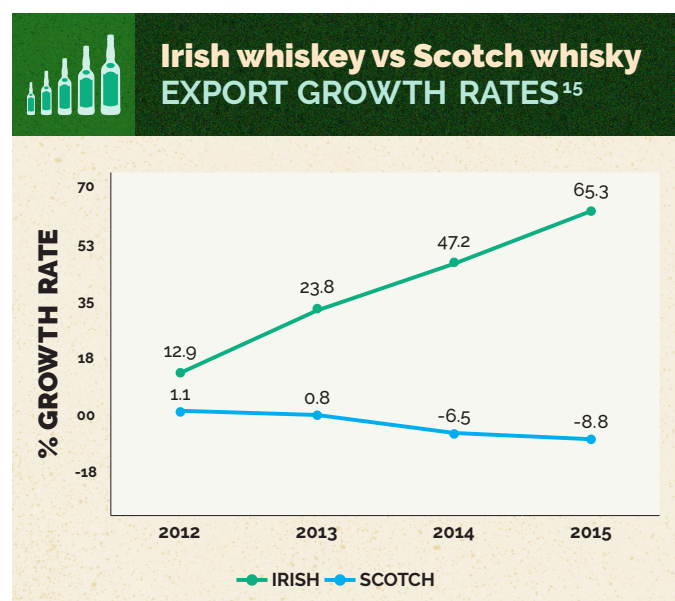
However, government support is essential to ensure that Irish distilleries remain competitive and maximise export and tourism potential. There are currently a number of barriers to new distilleries that prevent them from being able to maximise their turnover and tourism potential.

High excise duties for instance mean that Irish whiskey costs more to buy in Ireland than it does abroad, deterring tourists from purchasing whiskey during their trip to Ireland. A bottle of Irish whiskey that costs €42 in Ireland costs just €27 to buy in the United States.

Proposals to further restrict spirits advertising in Ireland will likewise make it more difficult for new and emerging distilleries to establish their brand and market visitor centres. Restrictive licensing laws also make it difficult for distilleries to sell their products on site and are a major financial burden for smaller distilleries.

Table 5. Comparing Irish Whiskey, Scotch and Bourbon tourism industries¹⁴

	Irish whiskey	Kentucky bourbon	Scotch whisky
1. Number of distilleries	16	31	109
2. Number of visitor centres	11	18	60
3. Tourist per visitor centre	59,000	50,000	27,000
4. Employment (direct, indirect)	4,948	10,647	40,300



¹⁴ Irish Whiskey Association (IWA), Member Survey, June 2016. Kentucky Distillers Association (KDA), The Economic and Fiscal Impacts of the Distilling Industry in Kentucky, 2014. Scotland.org, Whiskey <http://www.scotland.org/experience-scotland/scottish-food-and-drink/whisky> (18 August 2016).

¹⁵ Scotch export figures: SWA, Scotch Whiskey Exports Review 2015. Irish Whiskey export figures: Bord Bia, Insights for 2015; Bord Bia, Insights for 2014; IWA, Vision for Irish Whiskey, 2015



A dedicated all island whiskey tourism offering will draw even more tourists to distilleries across the island

2. DEVELOP AN ALL ISLAND IRISH WHISKEY TOURISM PRODUCT

The island of Ireland is the only place in the world where Irish whiskey can be legally produced.

The ancient craft is a unique part of our shared history and culture, drawing the North and South together.

Already many whiskey enthusiasts visit Ireland to experience the Irish whiskey distillery experience. As distillery numbers and infrastructure grow around the island so too will the number of whiskey enthusiasts visiting Ireland specifically for Irish whiskey tourism.

A dedicated all island whiskey tourism offering will draw even more tourists to distilleries across the island and will ensure that Irish whiskey enthusiasts experience all that this island has to offer.

There will soon be distilleries operating in 20 counties around the island, packaged together, these distilleries have the potential to become an essential part of every tourist's itinerary.

An all island offering will also help maximise the return from Ireland's growing whiskey sales abroad and ensure that smaller and new distilleries benefit from this success.

In Scotland one in five tourists visits a distillery.¹⁶ Scotch distilleries are marketed vigorously as holiday destinations that allow visitors to explore the region where their favourite Scotch is produced. Ireland needs to replicate this approach.

The Kentucky Bourbon Trail likewise encourages people to spend multiple days in the region exploring distilleries and engaging in wider-tourist activities.

Irish whiskey distilleries are set amongst some of the most spectacular scenery the island has to offer and have the opportunity to become one of Ireland's prime tourist offerings.

This approach will require cooperation amongst tourism bodies in the North and South of Ireland to ensure that distilleries on both sides of the border are able to benefit from the fantastic success of Irish whiskey abroad.



In Scotland one in five tourists visits a distillery

¹⁶ TNS Survey for Visit Scotland, Summer 2011 & 2012.

3. CREATE AN IRISH WHISKEY TRAIL AND TOURISM INFRASTRUCTURE AROUND DISTILLERIES

An Irish whiskey trail will showcase the best the industry and our island has to offer, encouraging tourists to visit our world class distilleries.

The trail will connect new and existing distilleries around Ireland, making it easier for tourists to visit numerous distilleries. It will encourage tourists and whiskey enthusiasts to broaden their knowledge of Ireland’s whiskey heritage and travel the island experiencing new and rare whiskeys.

The Bourbon Trail in Kentucky attracts nearly a million tourists to its distilleries every year showing that tourists are willing to build entire programmes around visiting distilleries if the infrastructure and incentives are there to encourage it.

The trail could be packaged as a tourist activity for whiskey enthusiasts and for tourists in general who are eager to learn more about Ireland’s heritage and explore towns that are off the beaten-track. There is an excellent opportunity to tie in with other parts of Ireland’s tourism offering, including leading sporting events, walking, cycling, story-telling, food trails and a thriving pub and musical culture around the Wild Atlantic Way and Ireland’s Ancient East.

The Irish whiskey trail will encourage tourists to spend more time in distillery towns and help to create tourism clusters around each distillery.

The Irish whiskey industry’s network of visitor centres will provide the opportunity for joint showcasing and experience of sustainable whiskey and food, a key priority for Bord Bia. Food pairing could add value to the Irish Whiskey trail experience. Food Wise 2025 noted benefits in better linking food, beverages and marine trails with the tourist experience.¹⁷

Distilleries act as an ‘anchor’ in local communities, attracting large volumes of tourists who try other local experiences.

In Scotland culture clusters have helped to create an additional 130 jobs around each distillery in accommodation, sports, recreation and culture. Scotch whisky tours are frequently combined with golf, fishing, hillwalking, cycling and other food and beverage experiences and attractions in the local community.

These activities are already available in Ireland but need to be further promoted and provide further potential for Ireland.

Table 6: Link between Scotch whisky and other activities¹⁸

	Additional Jobs per Distillery	Total Jobs
Sports, recreation and cultural	60	3,100
Accommodation	70	3,650
Total	130	6,750

In total, it’s estimated that 6,750 jobs are sustained in tourism and cultural clusters in communities across Scotland where distilleries are open to the public (52 in total).

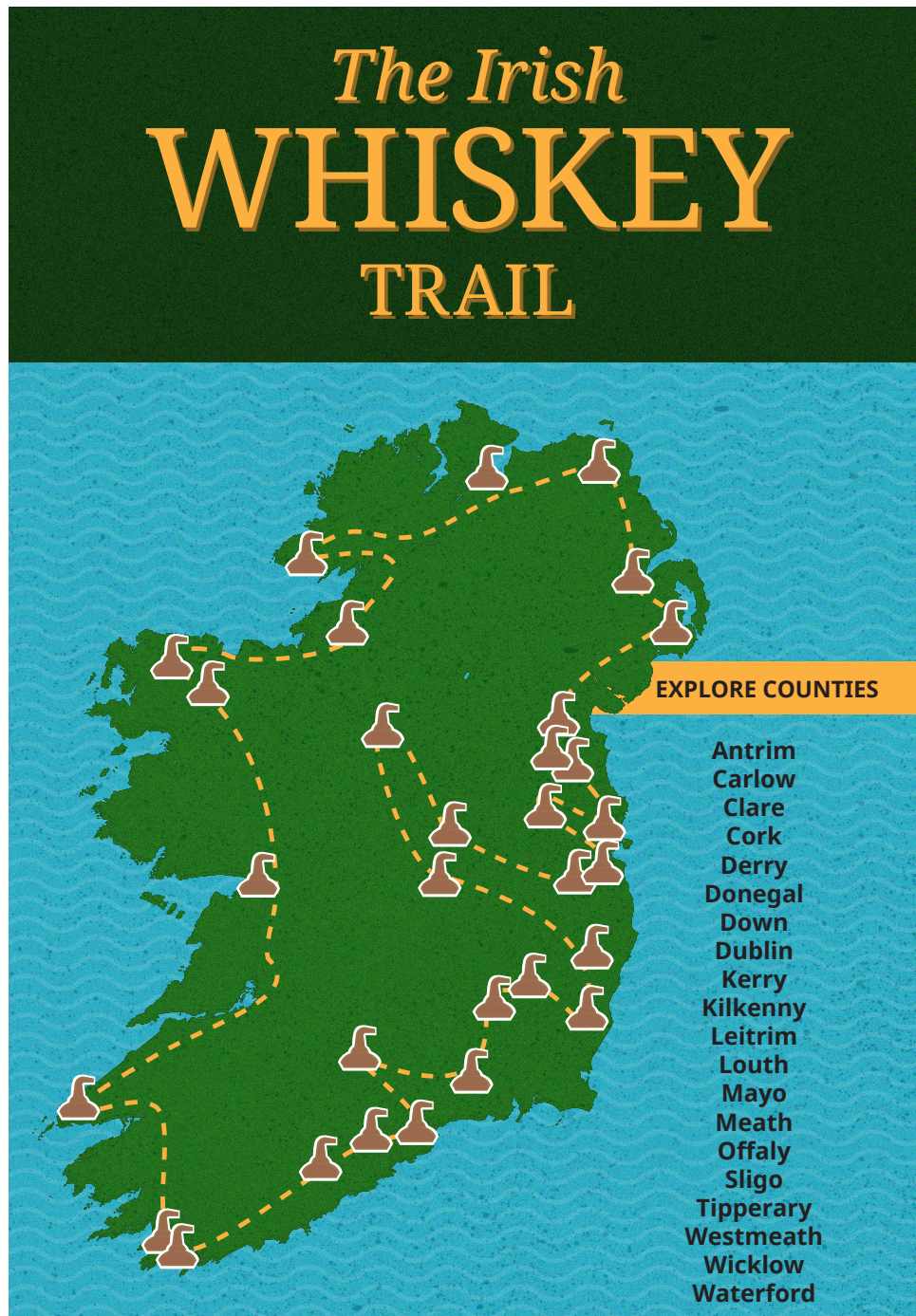
Applying the same methodology, Irish whiskey distilleries have the potential to support 3,250 jobs in communities around Ireland.

The Irish whiskey trail will encourage tourists to spend more time in distillery towns and help to create tourism clusters around each distillery

To achieve this, tourism infrastructure must be developed around Irish whiskey distilleries and visitor centres to ensure that there is a comprehensive whiskey tourism package on offer and attract the high volumes of tourists needed to create sustainable jobs.

The Irish distillery and tourism sector is still very much in a growth phase, but if the right infrastructure is put in place now it will be possible to create new cultural hubs and jobs in towns around Ireland.

¹⁷ 2025 Agri Food Strategy Committee, Food Wise 2025, p. 58
¹⁸ Scotch Whisky and Tourism, by 4 Consulting & Scotch Whisky Association, July 2011



KENTUCKY BOURBON TRAIL

The Kentucky Bourbon Trail was started in 1999 and now has nine members. The trail has been a phenomenal success, encouraging tourists to visit multiple distilleries during their holiday.

The trail has its own specialised Bourbon passport, which rewards visitors with a t-shirt if they succeed in visiting all nine distilleries on the main trail. To date 90,000 people have visited every distillery on the trail.

The success of the trail led to the development of a specialised Craft Tour in 2012 showcasing Kentucky's lesser-known distilleries.

Together the two tours had almost 900,000 visitors, a nearly doubling of visitors in five years. A large proportion of this growth was in the Craft Tour, which saw its visitor numbers increase by 39% over the course of a year to 133,864 visitors.¹⁹

¹⁹ Kentucky Bourbon Trail, Kentucky Bourbon Trail Visits Skyrocket with 900,000 Guests in 2015, Press Release 21 January 2016.

4. DEVELOP AN EMBASSY NETWORK OF HOTELS, RESTAURANTS AND PUBS

A hospitality embassy network connected to the Irish whiskey trail will make it easier for visitors to undertake specialist whiskey tours, while extending the benefits of whiskey tourism to local businesses.

Some of Ireland's best restaurants and pubs are located in remote parts of the country. An embassy network will direct tourists to some of Ireland's best establishments that reflect the passion and pride of our whiskey heritage.

The embassy network could be made up of hotels, restaurants, pubs, golf clubs and other tourist attractions that reflect the high-quality standards of Irish whiskey. Members would receive training in the Irish whiskey distilling process, the different styles of Irish whiskey and will learn about their local distillery.

The existence of such a network would help drive more people to visit Irish distilleries as well as encourage tourists and whiskey aficionados to spend even more time in the local pubs, hotels and restaurants.

In Scotland, the embassy network receives 4.5 million visitors every year and encompasses 90 hotels, golf courses, bars and restaurants around the country. 1,370 jobs have been created through the Scotch embassy network adding £43.2 million to the economy.

The existence of an embassy network would facilitate tourists to explore towns and encourage visitors to try new places. While it is not possible to quantify the exact impact an embassy network would have on Ireland, it is expected that it could have a major impact on local employment and turnover figures in towns around Ireland.

Table 7: Economic impact of Scotch whisky embassy network²⁰

	Direct	Indirect and induced	Total
Turnover impact (million)	£50.3	£28.0	£78.3
GVA impact (million)	£28.9	£14.3	£43.2
Income impact (million)	£18.9	£9.4	£28.3
Employment impact (jobs)	1,100	270	1,370



IRISH WHISKEY EMBASSY NETWORK


In a recent survey of Scotch whisky nearly three quarters of embassy network members stated that Scotch played an important or very important role in attracting visitors to their establishments.

Since its establishment the Kentucky Bourbon Trail has grown to become a major tourist attraction, being listed in CNN International's list of "Top 10 Classic American Experiences". The local hospitality industry has directly benefited from the trail through the establishment of a partnership program between hospitality outlets and the Kentucky Bourbon Trail in a similar vein to the embassy network in Scotland. This ensures that the benefits of bourbon tourism spreads beyond the distilleries and that these visitors get a fuller experience, stay longer and spend more in the local area.

The State of Kentucky has also developed the Urban Bourbon Trail in both Louisville and Lexington which has created an embassy network of bars, hotels and restaurants that list an expanded range of bourbons and have staff well educated and trained in bourbon tasting and heritage. This is something that could be replicated in urban areas such as Dublin, Cork, Limerick and Galway.

Irish hotels, restaurants and pubs in distillery towns are likewise expected to benefit from the creation of a whiskey tourism trail and embassy network, helping to drive hundreds of thousands of additional tourists through their doors.

²⁰ Scotch Whisky and Tourism, by 4 Consulting & Scotch Whisky Association, July 2011

A photograph of a whiskey distillery bar. The bar is made of dark wood and features a central pillar. Above the bar, there are wooden barrels with labels like "Smooth", "Triple Distilled", "Pot Still", and "Ma". Shelves behind the bar are filled with various bottles of whiskey. The floor is made of dark, rustic wooden planks. Two wooden stools are visible in the foreground.

**An embassy network
will extend the benefits
of whiskey tourism to
local businesses**



There is an opportunity to capitalise on Irish whiskey's growing sales and utilise this to drive more tourists to Ireland

CONCLUSION

Irish whiskey is in a period of exponential growth. There are plans to open in excess of 31 Irish whiskey distilleries across 18 counties over the next ten years. This brings an opportunity to attract large volumes of tourists and create sustainable jobs around the Island.

Irish whiskey is reaching new markets and new consumers, acting as a premium global brand ambassador for Ireland. As the popularity of Irish whiskey increases abroad, so too does the desire among consumers to make the visit to Ireland to experience where it is made.

Now there is an opportunity to capitalise on Irish whiskey's growing sales and utilise this to drive more tourists to Ireland. If the full potential of the industry is realised, Irish whiskey tourism will triple from 653,277 visitors to approximately 1.9 million visitors every year, spending an estimated €1.3 billion during their stay.

Irish whiskey has a great story to tell – of authenticity, heritage, and revival. Tourists to Ireland value its history, culture and stunning scenery, and our distilleries are a perfect way to showcase all that our island has to offer.

The benefits of Irish whiskey tourism are far reaching. It has the potential to support over 2,000 direct and indirect jobs in rural communities across Ireland, creating value for regions in which they are based as well as for the broader Irish economy.

The bright future of Irish whiskey tourism is dependent on distilleries working with local communities and national government and its agencies to:

1. Support the growth of Irish whiskey distilleries and visitor centres
2. Develop an all island whiskey tourism product
3. Create an Irish whiskey trail and tourism infrastructure around distilleries
4. Develop an embassy network of hotels, restaurants and pubs

The establishment of an all island whiskey trail could attract a significant number of tourists to Ireland, but the necessary infrastructure must be put in place for it to be a success.

Irish whiskey distilleries are already succeeding in attracting tourists to Ireland, but the development of an embassy network and cultural hubs around each distillery will add value to tourists visiting Ireland and encourage them to spend more time in towns across Ireland.

With these support systems and solid foundation structures in place Ireland will be able to offer an even more distinctive whiskey tourism product with global appeal, setting it on the path to become the world leader in whiskey tourism by 2030.

**Over €1 billion will be invested
in Irish whiskey distillery
projects between 2010-2025**



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