

MOVE

Presentation of Mobility Outdoor Value Estimates (MOVE)

November 13th, 2025

Introduction

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MOVE is a pilot research project between Transport Infrastructure Ireland (TII) and Fáilte Ireland.

Limerick CCC, Mayo CC, Waterford CC, Wexford CC, Kilkenny CC and Westmeath CC.

MOVE is a programme of intercept surveys and counts to understand the profile and preferences of greenway users in Ireland.

Project Aim: Develop a methodology for monitoring the use and impact of Ireland's Greenways.

To date, 3,619 User Intercept Surveys have been undertaken of greenway users and over 209,000 active travel users have been recorded across the five greenways forming part of this pilot project.



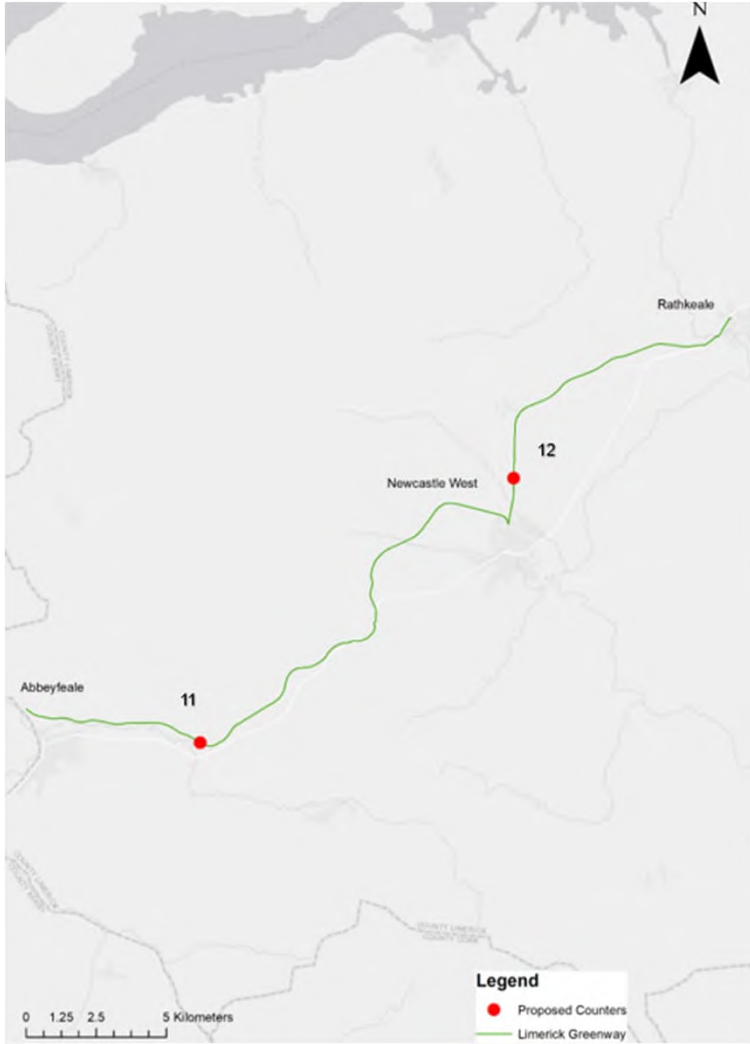
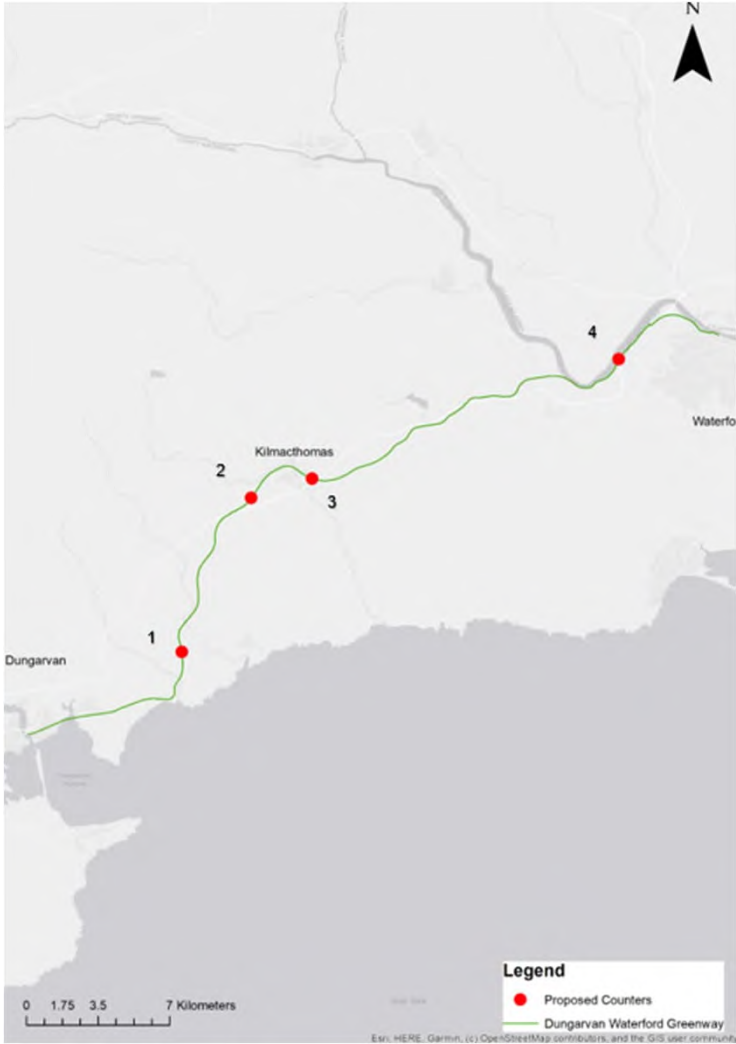
Where and when will the surveys be undertaken?

The primary focus of the MOVE pilot is on five Greenway locations distributed across different regions of Ireland, each associated with a relevant local authority:

- Great Western Greenway (Mayo Co. Co)
 - South East Greenway (Wexford Co. Co/ Kilkenny Co. Co)
 - Old Rail Trail (Westmeath Co. Co)
 - Limerick Greenway (Limerick City and Co. Co)
 - Waterford Greenway (Waterford Co. Co)
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- Winter (December 2023, 2024)
 - Spring (March/April 2024, 2025)
 - Summer (June 2024, 2025)
 - Autumn (September 2024, 2025)



MOVE Count Locations



MOVE Count Locations





MOVE User Intercept Surveys

Greenway	Site Ref	Location Description	Location Coordinates
Waterford Greenway	Site 1	Dungarvan Trailhead	52.098753, -7.582964
	Site 2	Kilmacthomas Access	52.206026, -7.421201
Limerick Greenway	Site 1	Rathkeale Trailhead	52.524907, -8.944958
	Site 2	Barnagh Greenway Hub	52.420884, -9.133533
Old Rail Trail Greenway	Site 1	Athlone Trailhead	53.427998, -7.931608
	Site 2	Mullingar Trailhead	53.517030, -7.368428
Great Western Greenway	Site 1	Westport Trailhead	53.813665, -9.536397
	Site 2	Newport Access	53.891608, -9.547103
South East Greenway	Site 1	New Ross Trailhead	52.398953, -6.948139

User Intercept Surveys take place on one weekday and one weekend day throughout the course of each week long survey.

The Survey Questionnaire is a total of 20 questions for each respondent which a branching logic that splits “residents” and “visitors”.

Key Findings

MOVE Key Findings

<i>Greenways are for Everyone</i> Greenways provide equal access to all. Men and women are represented equally and people of all ages uses them.	
<i>Local Amenity</i> Greenways are a fantastic local amenity, with a high proportion of local users recorded during the MOVE surveys. Thousands of local people use greenways daily.	
<i>Local Business</i> Greenways benefit cafés, restaurants and hotels within their local area. People on the greenway want to buy coffee, food and sometimes spend the night nearby.	
<i>Word of Mouth</i> Every greenway is unique. They are a fantastic local, regional and national amenity. Greenways are known mainly through word of mouth, with users being impressed and sharing their positive experience of the greenway.	
<i>High User Satisfaction</i> People have a high user satisfaction on greenways with surfacing, presentation, scenery and nature seen as people's favourite parts of the greenway.	
<i>Future Greenway Enhancements</i> The feedback on greenways is overwhelmingly positive but there are areas to improve upon. Access to toilets and bins are frequently mentioned by users to be lacking.	

MOVE Key Findings, Location

Location

Greenway usage varies by location—urban greenways like the Old Rail Trail attract more pedestrians, while scenic rural routes like the Great Western Greenway see more cyclists and tourists.

People generally use greenways for return journeys rather than one-way journeys. This could present the opportunity to provide public transport that can facilitate walking longer on the greenway in one-direction and getting the bus back.

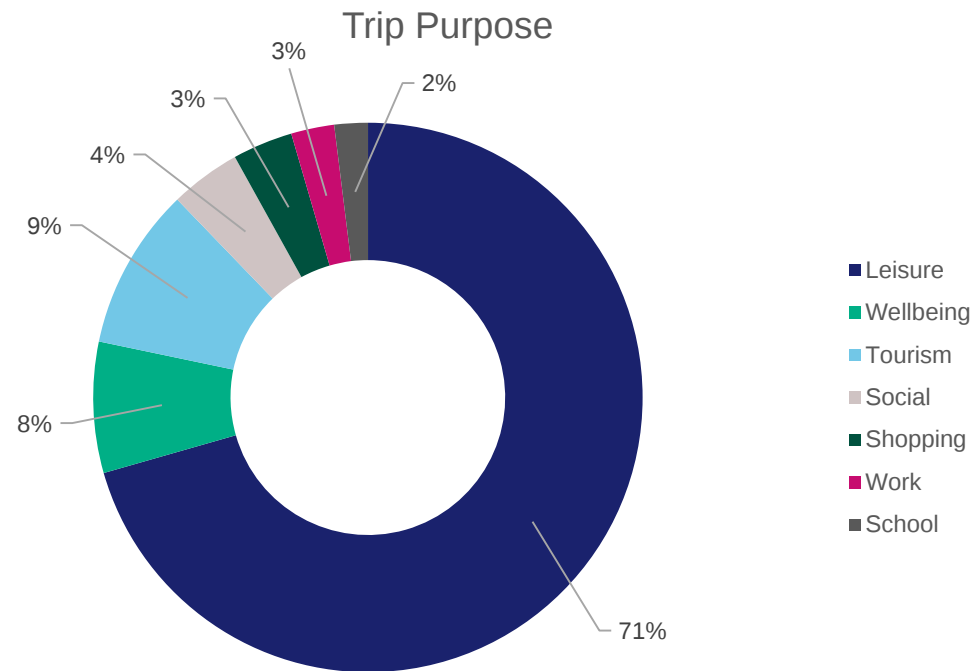
“Down one-way for 20-30 mins then back” – Limerick Greenway User



MOVE Key Findings, Trip Purpose

Trip Purpose

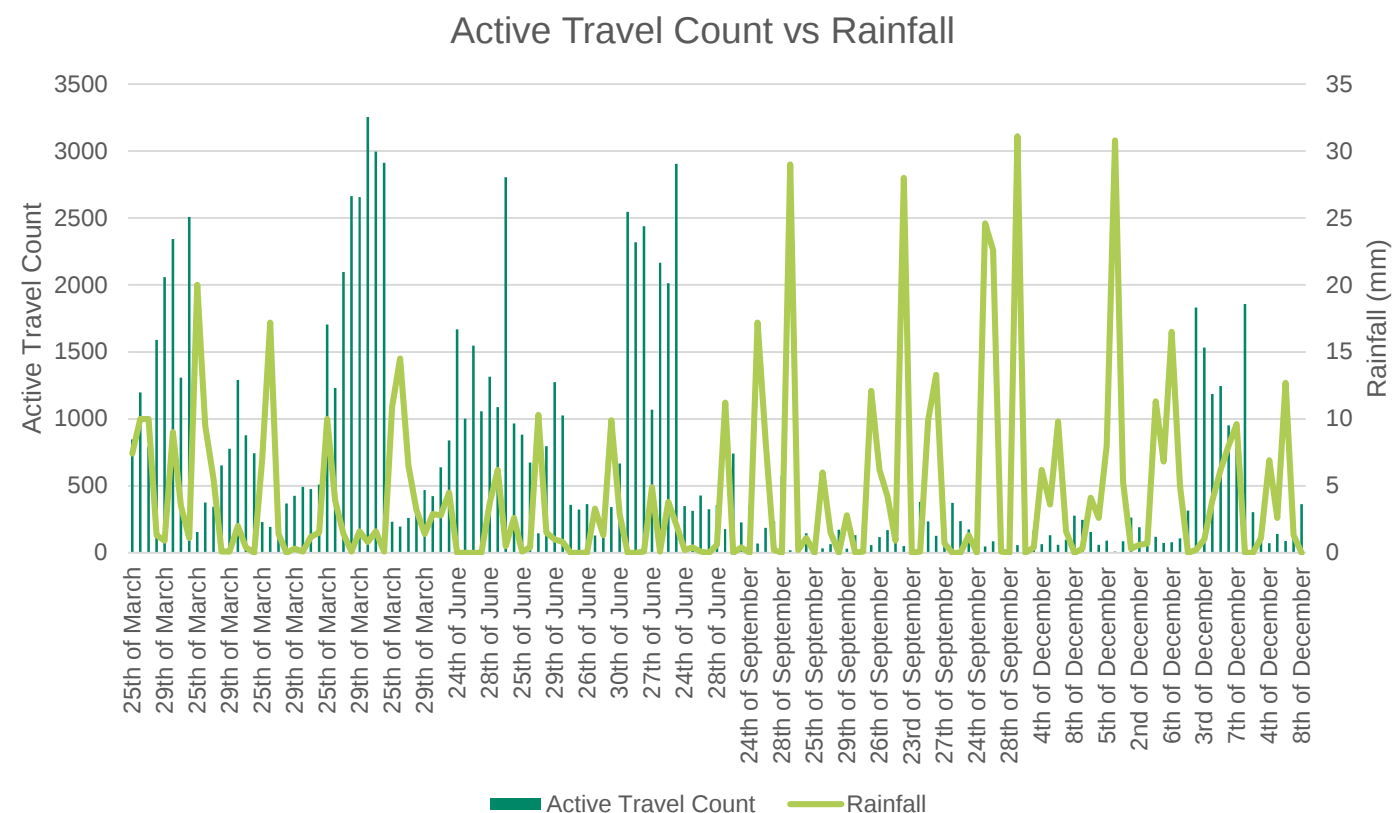
79% of greenway users cite leisure and wellbeing as their main reason for use-highlighting greenways as vital local spaces for recreation and nature access.



MOVE Key Findings, Weather

Weather

Weather affects active travel users more than any other mode of travel. Weather also affects respondents time on the greenway with some saying their time spent on the greenway is completely weather dependent. Some respondents even said that they will not use the greenway in the winter at all due to the poor weather.



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MOVE Key Findings, Access Points



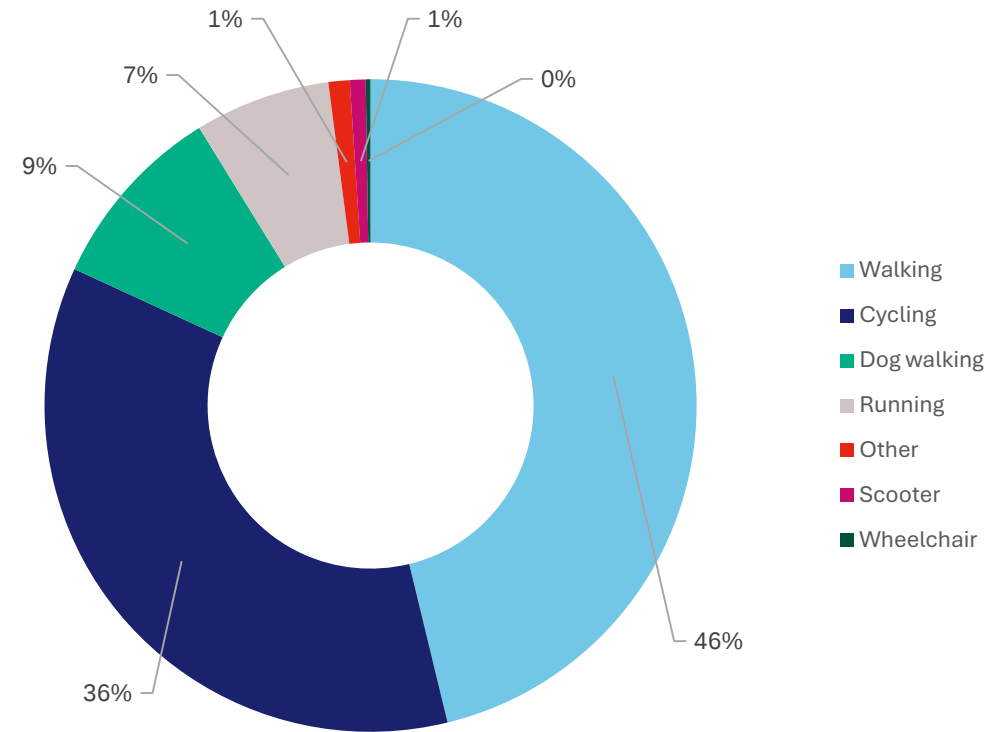
Old Rail Trail – Streamstown Station Access



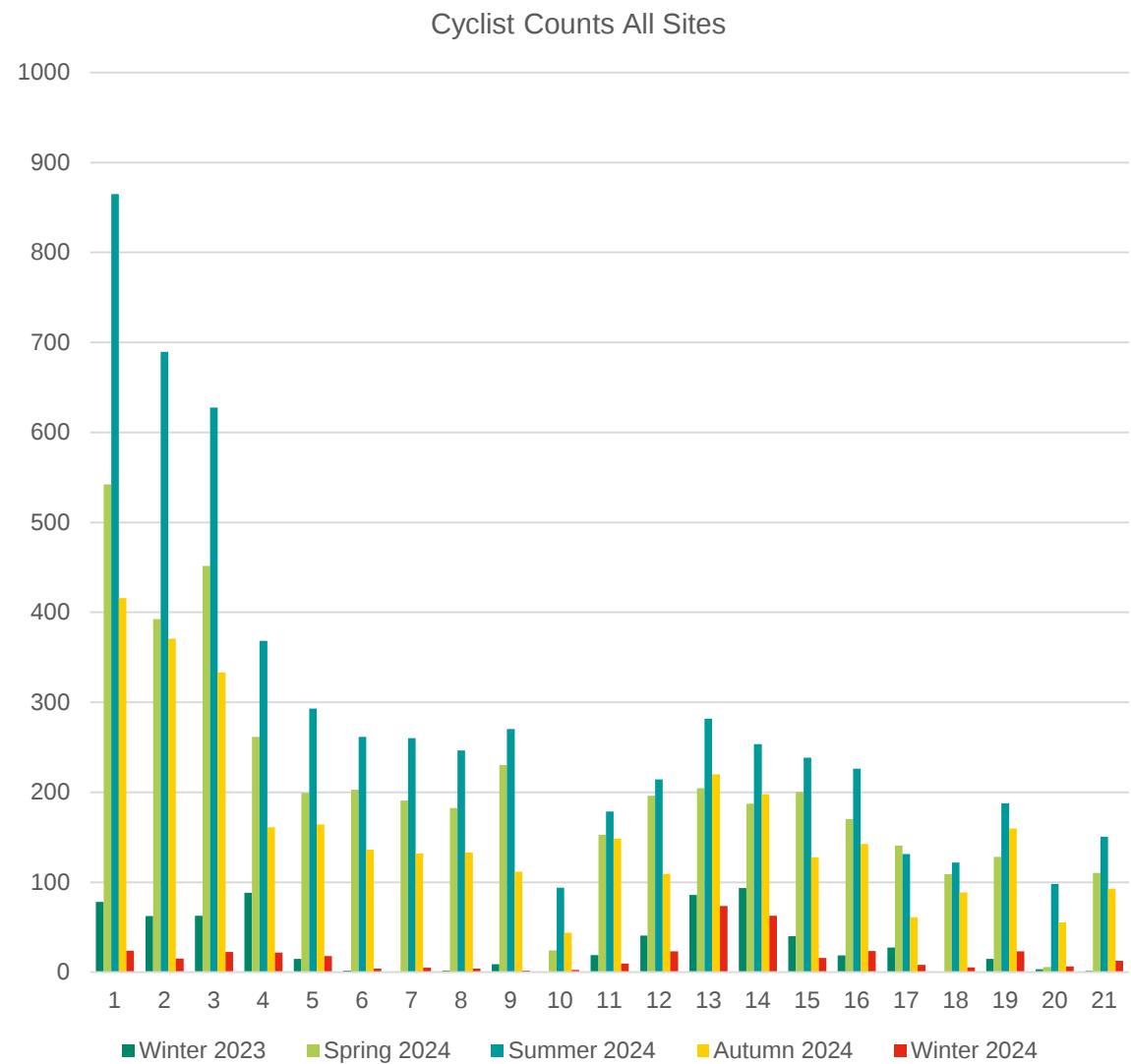
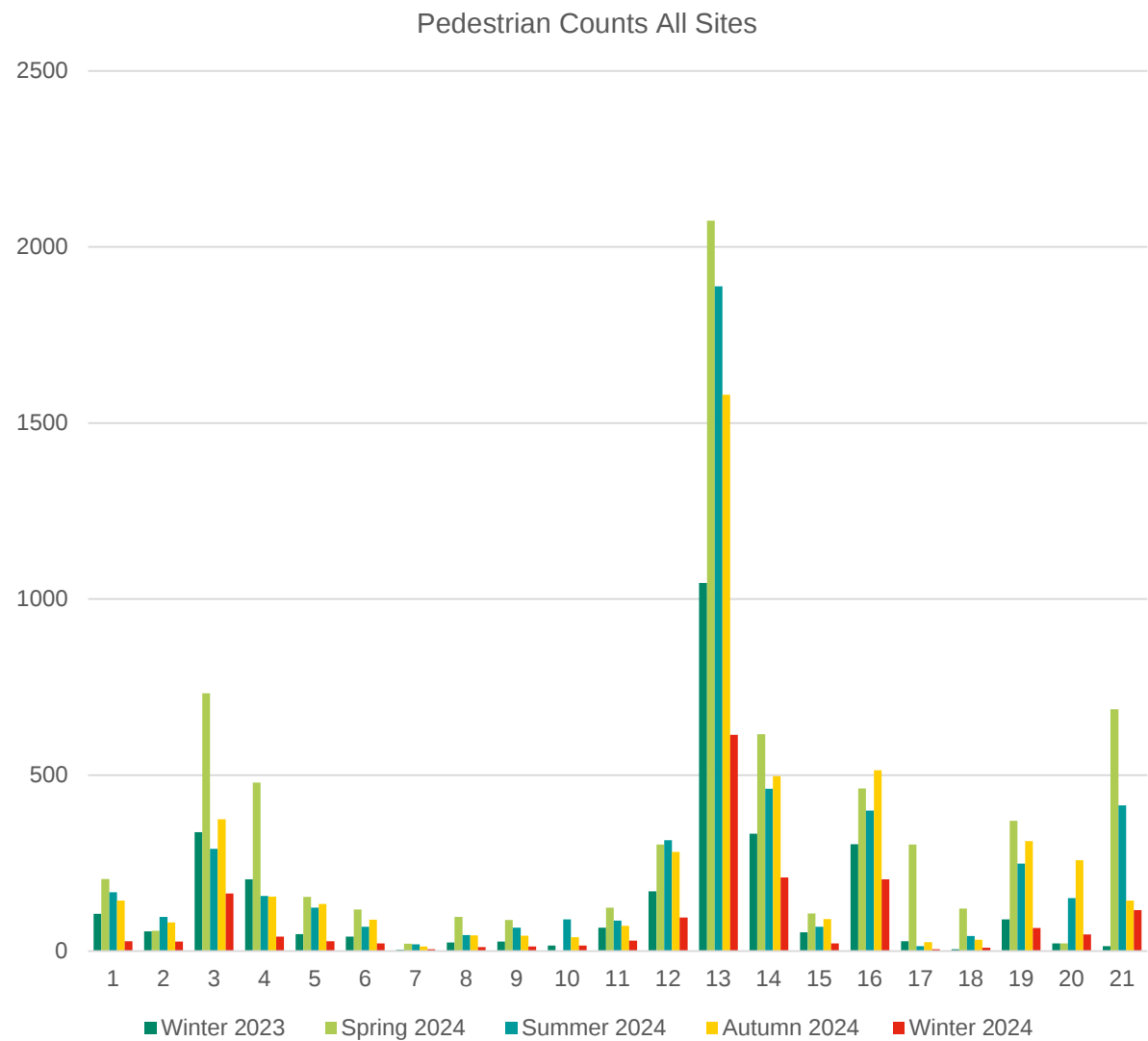
Great Western Greenway– Achill Access

MOVE Key Findings, Diversity of Users

- Pedestrians consistently outnumber cyclists on greenways.
- Cycling peaks on weekends, accounting for 37% of total cyclist counts.
- Across seven surveys, 83,336 cyclists were recorded versus 125,955 pedestrians.
- The Great Western Greenway stands out, with cycling as the dominant activity (56%).
- Users span all age groups and genders, with 52% men, 47% women, and 1% non-binary or undisclosed.
- Most users are families or groups, though 42% are solo visitors.

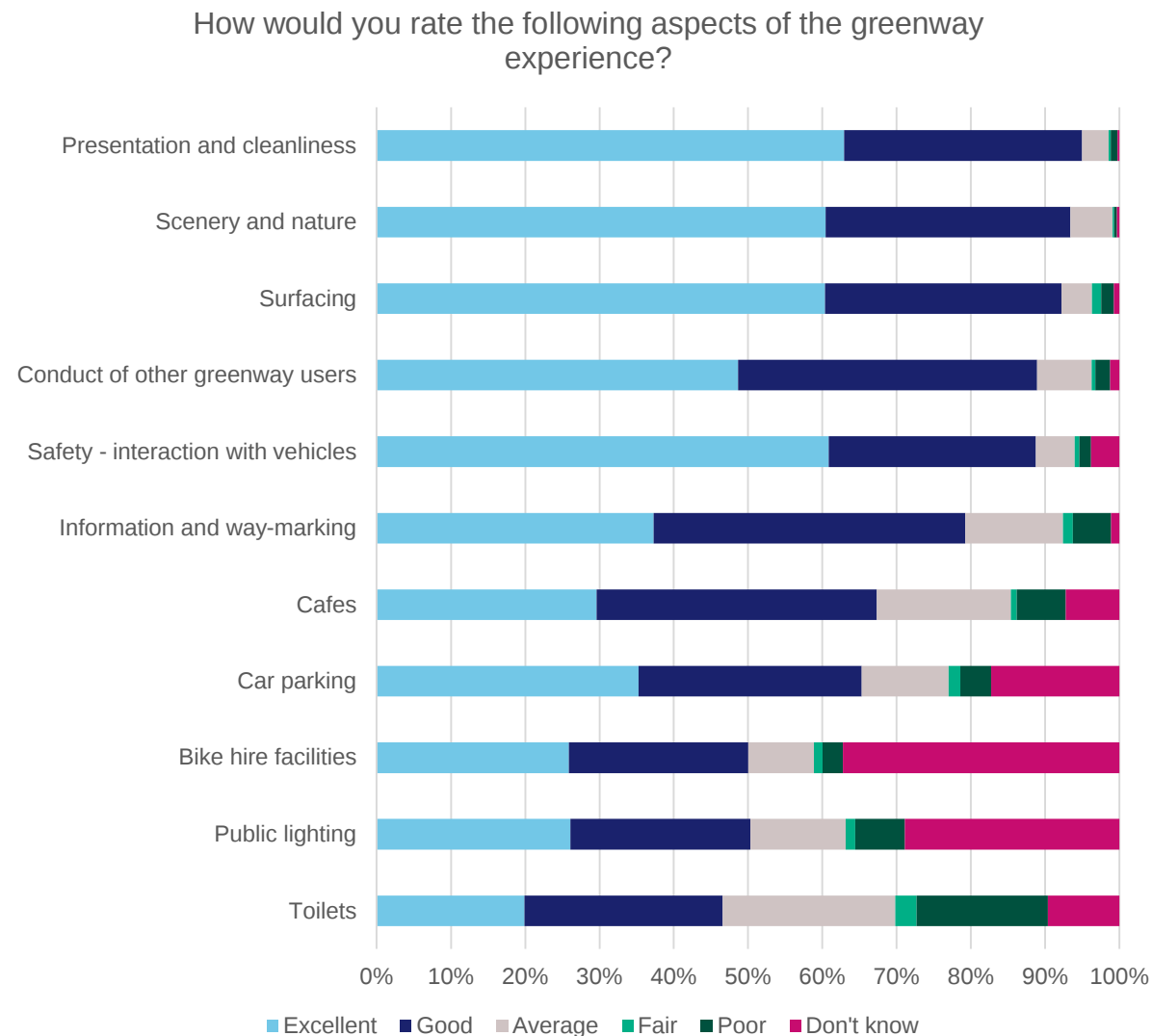


MOVE Key Findings, Cycling in the Summer



MOVE Key Findings, Facility Ratings and Areas to Improve

- Greenways score highly on presentation, cleanliness, scenery, and surfacing - over 92% rated these as good or excellent.
- 89% of users rated safety and user conduct positively.
- Public lighting and facilities like toilets, bins, and access points received mixed feedback, highlighting areas for improvement.
- While most users had no complaints, recurring concerns included anti-social behaviour, dog issues, and lack of amenities.



Key Findings & AMAT

Benefit/Tool

	AMAT (DfT standard tool)	AMAT+AECOM Toolbox (TEAM)	MOVE
Congestion Benefit			
Maintenance			
Accidents			
Local Air Quality			
Noise			
Greenhouse Gases			
Reduced risk of premature death			
Absenteeism			
Journey Ambience			
Leisure benefits			
Journey Time Savings			
Sensitivity Analysis			
Recreational spend			

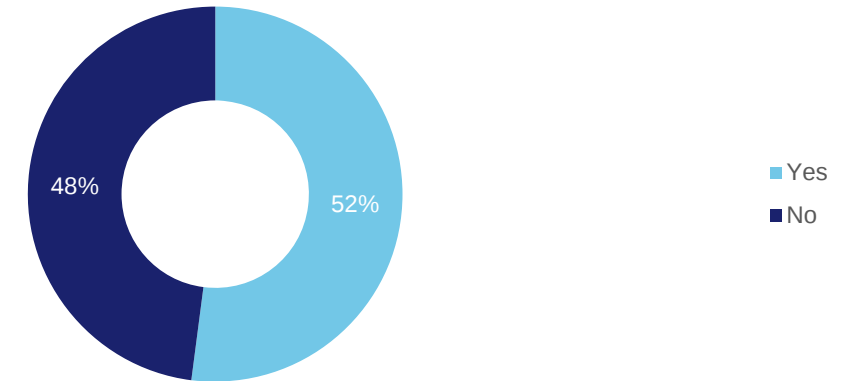


Based upon Irish evidence

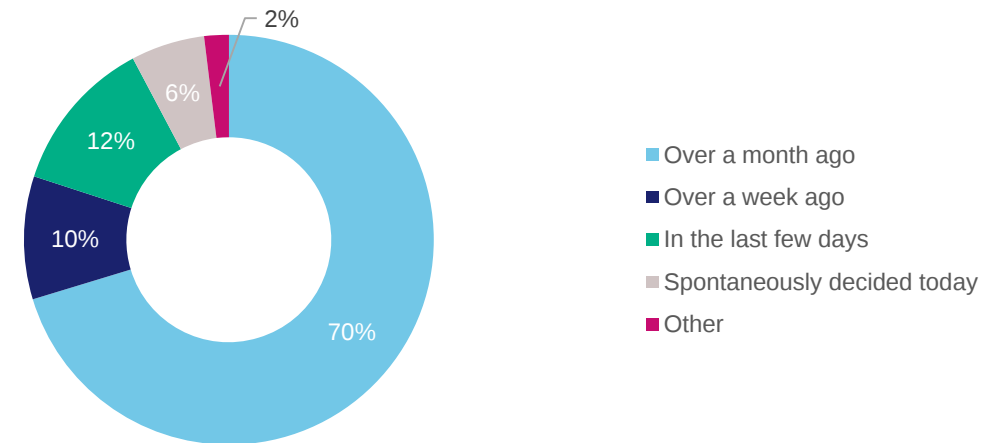
MOVE Key Findings, Spend in the Local Economy

- Greenways boost local economies-51% of users spend money along the route, mostly on food and drinks, supporting small businesses.
- 52% of cycling tourists rent bikes locally, and many stay in hotels, B&Bs, or Airbnbs, with hotel guests spending over €300.
- Greenways attract well-planned tourist visits, with 83% citing them as key attractions and 90% saying they'd use one if available.
- They promote inclusivity by offering free, accessible spaces for exercise and socialising across all demographics.
- Greenways are vital community assets-driving tourism, distributing local wealth, and encouraging healthier lifestyles.

Tourists: Did you hire a bike?



Tourists: When did you decide to visit the greenway?

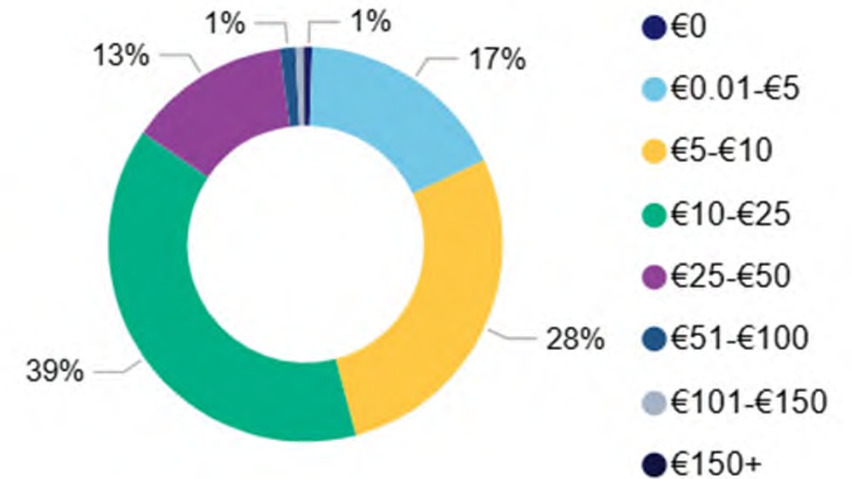


How much do you spend on the greenway?

- Highest spending group: €10 - €25 (39%)
- Next most common: €5-€10 (28%)
- Minimal spend: €0.01-€5 (17%)
- Moderate spend: €25 - €50 (13%)
- High spenders: €51-€100, €101-€150, and €150+ each at 1%

Overall trend: Majority of visitors spend under €25

How much do you spend on the greenway?



Sample size: 1747

Why this matters for AMAT/TAG?

UK TAG / AMAT prefer a **Willingness-to-Pay (WTP)** calculus for valuing non-market quality & user benefits (it captures subjective trade-offs). TAG explicitly notes that subjective WTP valuations can capture different components of value and is an accepted approach for monetising user benefits. TAG also requires transparent construction of without/with forecasts and sensitivity testing.

What MOVE already gives you (useful building blocks)

MOVE provides:

- Seasonal on-site intercept surveys (user profile, trip purpose, frequency, likely origin, some expenditure/behavioural questions).
- Automated/presence counts (AADT-like counts for greenways).
These can supply: baseline demand, trip length distribution, user socio-demographics, and temporal patterns - all essential for scaling per-trip WTP to yearly totals.

What MOVE Delivers

- Hard data, not assumptions: Real on-site user counts and intercept surveys build a living dataset of who's using your routes, when, and why.
- Behavioural insights: MOVE reveals patterns of use - local vs. visitor, commute vs. leisure, seasonal flow - so you can benchmark and forecast confidently.
- Quantified "value of use": Using accepted appraisal frameworks (aligned with the UK's AMAT and TAG principles), MOVE translates observed outdoor activity into economic value, ready-made for business cases.
- Future-proof monitoring: Repeatable survey cycles allow you to track performance over time - demonstrating return on investment and social impact.

Next Steps

- Continue seasonal monitoring, Winter 2025 (early December) is coming up.
- Two-year review of MOVE 2023 – 2025.

Contact

- Thank you for listening today.
- If you would like to contact us on relation to any of this material, please reach out to Felim.Kelly@aeom.com.

Website

- [Result Dashboard - MOVE](#)



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