

Mobility and Outdoor Value Estimates (MOVE)

Key Findings Report // 2026

Prepared for

Transport Infrastructure Ireland

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Executive Summary //

What is MOVE?

Mobility and Outdoor Value Estimates (MOVE) is a pilot research collaboration between Transport Infrastructure Ireland (TII) and AECOM. The project focuses on developing a robust monitoring methodology and creating practical tools and evidence to strengthen business cases for greenway investment. These insights will help to inform development decisions and enhance the understanding of the economic impacts of greenways.

MOVE further aims to provide insights into user behaviour and preferences, helping shape the future of Ireland's greenways. A programme of intercept surveys and counts is ongoing to capture detailed profiles and preferences of greenway users. This report covers 4,253 User Intercept Surveys undertaken with greenway users and over 249,000 active travel users recorded across the greenways forming part of this pilot project.

This report presents the key findings and analysis of MOVE. The analysis is based on counts and intercept surveys undertaken on five greenways across Ireland between winter 2023 and autumn 2025. Data collection as part of MOVE has continued to date.

MOVE aims to understand greenway user behaviour to inform future development and investment.

MOVE will develop new monitoring methodologies for greenways which can be implemented across existing and future greenways.

1



Greenways are for Everyone

Greenways provide access for all. MOVE surveys captured a wide user population. Men and women were largely equally represented among respondents, and people of all ages were found using greenways.

2



Local Amenity

Greenways are a valuable local amenity, with a high proportion of local users recorded during the MOVE surveys. Thousands of local people use greenways daily.

3



Local Business

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.

5



High User Satisfaction

People have a high user satisfaction on greenways. Surfacing, presentation, scenery and nature are seen as peoples' favourite parts of the greenway.

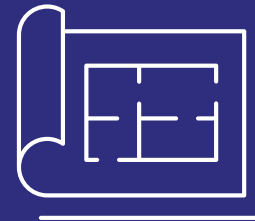
4



Word of Mouth

Every greenway is unique. They are a valuable 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.

6



Areas to Improve

The feedback on greenways is overwhelmingly positive but there are areas to improve upon. Access to toilets and bins are frequently mentioned as lacking.

Key Insights //

1 // Factors that Influence Greenway Usage

1.1 Location

Each greenway is unique, and the MOVE survey data highlights the importance of greenway location and proximity to urban centres to increase foot-fall. Greenways adjacent to urban locations such as the Old Rail Trail have large pedestrian usage, which is linked to active travel infrastructure providing a safe and attractive amenity for local users in the area. On the other hand, more rural greenways, such as the Great Western Greenway see higher levels of cyclist usage, particularly by tourists.

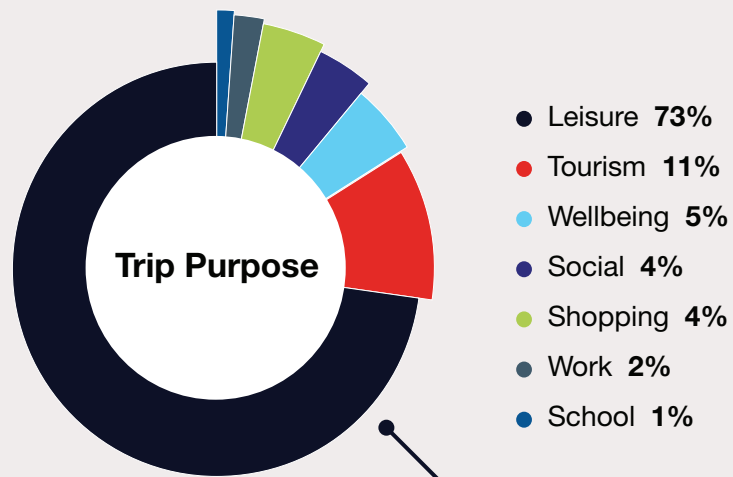
People were found to generally use greenways for return journeys rather than one-way journeys. Many people reported walking the greenway for a certain amount of time and returning to their start point the same way they walked out. The greenway provides them with a route to walk in their local area and an opportunity to experience nature.

“Down one-way for 20-30 mins then back”

– Limerick Greenway User



Athlone Greenway Bridge



1.2 Trip Purpose

People are choosing to spend their free time on greenways. The vast majority of surveyed greenway users (82%) are there for leisure/exercise, a social activity or their personal wellbeing. This highlights the key role greenways play for people as a gateway to the outdoors, recreation and nature and as providing a free recreational amenity within the locality.

Greenways also facilitate trips for a range of more functional purposes. Overall, trips for work, shopping and school make up 7% of all trips. Where greenways are close to town centres and populated areas this functional use proportion increases.

Almost half (47%) of all surveyed greenway users, spend in excess of 60 mins on the greenway. However, large variations are found between local users and tourists. 47% of local users use the greenway for more than 60 mins, aligning with trips made in their free time. In comparison, 88% of tourists use the greenway for more than 60 mins.

1.3 Weather

Weather affects active travel users more than any other mode of travel regardless of location. On greenways, weather is found to be a key factor for the time spent on the greenway by respondents. Some reported that their time on the greenway is completely weather dependent and even said that they will not use the greenway in the winter at all due to poor weather.

1.4 Knowledge of the Greenway

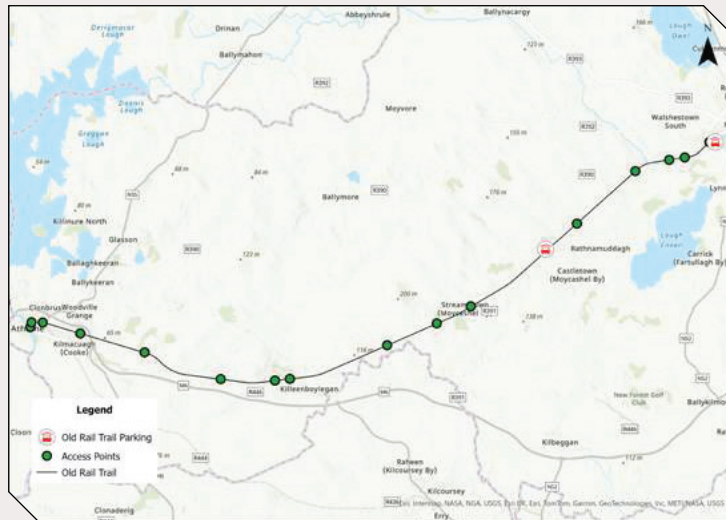
Surveyed greenway users had mostly heard about the greenway through word of mouth (46%) rather than through a website or social media. The importance of word of mouth for greenways is due to the infrastructure generally exceeding user expectations. This creates an experience that has to be seen to be believed.



2 // Access Points and Local Use

The planning and design of a greenway benefits from the consideration of the local context and wider characteristics of the area. Access points are an important aspect to boost patronage of the greenway. MOVE has demonstrated local usage of greenways far exceeds usage by tourists, with 11% of users across all surveyed greenways being tourists. Therefore, more access points near urban centres will facilitate access for local users, and more car parks on a greenway attract people who want to drive and walk the route.

Situated in Fáilte Ireland's 'Hidden Heartlands', the Old Rail Trail has an abundance of access points which are located around many towns such as Athlone, Moate, Streamstown and Mullingar. Local pedestrians gravitate towards this active travel spine in the middle of Ireland, with the majority saying they use it for leisure and exercise.



Old Rail Trail Access Points and Car Parks



Old Rail Trail / Streamstown Station

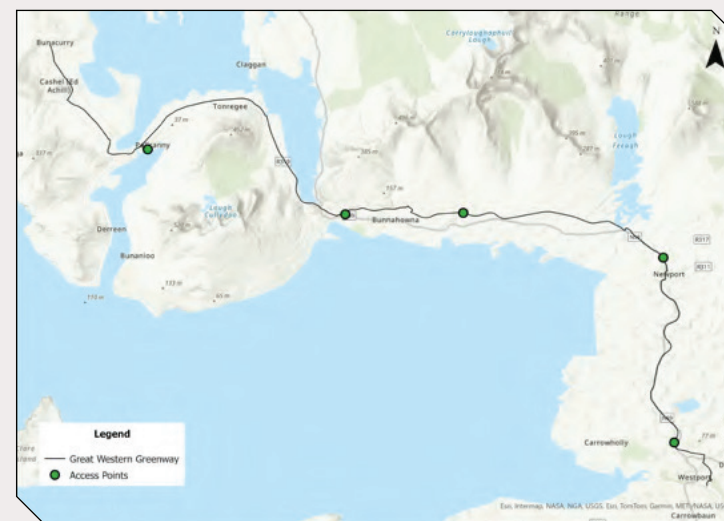
Old Rail Trail greenway is an example of a trail where the alignment provides strong local access. A historical railway, the route was designed to service local population hubs. This now results in a greenway better able to serve these same communities with frequent access points to their local greenway.

In comparison to the Old Rail Trail, the Great Western Greenway features far fewer access points. With an access in Westport, Newport, Mulranny and Achill Sound, the other access point is located in Tiernaur some distance away from the nearest houses located on the N59. Local businesses in the area provide signage on the greenway to their establishments.

The lack of access points on this greenway is directly linked to its rural setting, and incidentally it attracts a higher number of non-locals relative to other greenways.

Greenways can play an important role for local tourism, bringing visitors through areas they would not have otherwise visited. However, local use is the backbone of the greenways and if locals are to use the infrastructure, MOVE results suggest that providing more frequent access points is a key priority.

Greenways constructed in built-up areas benefit from an abundance of access points to facilitate locals to use the greenway for their daily leisure and exercise. MOVE has found that the majority of greenway users are locals.



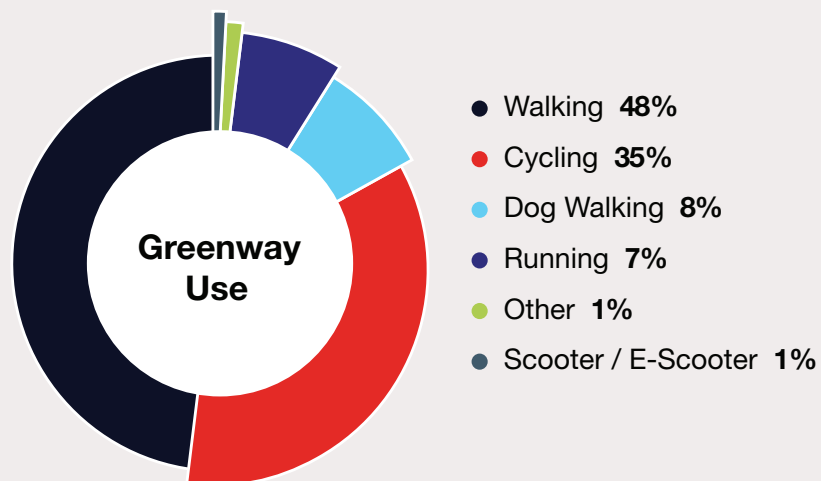
Great Western Greenway Access Points

3 // Types of Users

Demographics of MOVE show that the greenways are used by a variety of different groups. Across all survey days, all age groups are represented on the greenways and users were made up of 51% men and 48% women. The remaining 1% did not identify as male or female or preferred not to state their gender. The majority of users recorded are groups, like a family walking or cycling together who stop and use other amenities along the greenway such as playgrounds. The other main user group are people going for walk or cycle by themselves, who account for 38% of users.

Across all survey periods, most people on greenways are walking. Overall, the total cycle count for the eight surveys is 98,390, while the total pedestrian count is 151,178 over the same period. More recently in MOVE Autumn 2025, the total cyclist and pedestrian count was 14,746 and 25,419, respectively. Greenways were also travelled by other types of active travel users as shown in the graph to the left.

Large variations were found across individual greenways and survey periods. Across all seasons, MOVE survey data revealed that on the Great Western Greenway cycling was recorded as the most popular activity at 68%, while on the Old Rail Trail walking was the most popular use of the greenway at 76%.



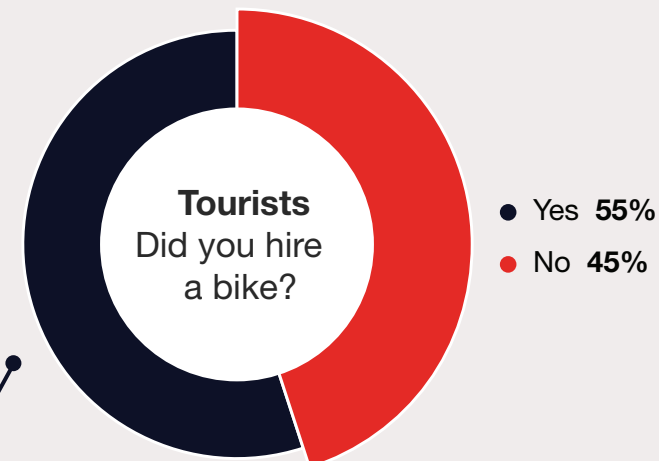
4 // Tourism and Spend in the Local Economy

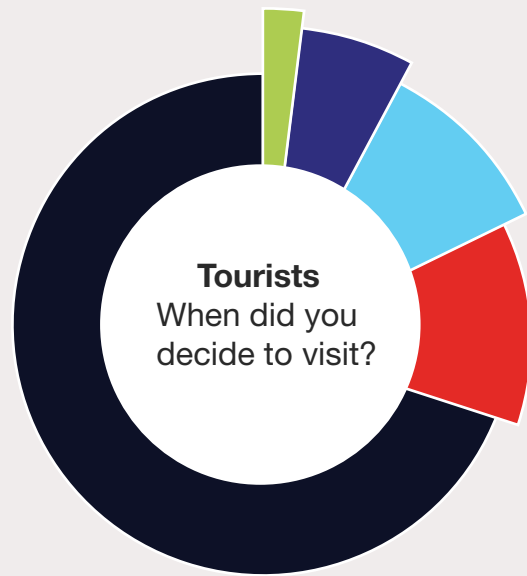
Greenways were found to support their local economies. 55% of MOVE survey respondents said they had spent money along the greenway, which is most commonly at bicycle hiring shops and cafes. These businesses can then provide jobs and economic benefits to their local areas and communities.

Most respondents who spent money while on the greenway spent up to €25 (86%), with the most popular purchases being coffee, tea, beverages and food.

It was found that 55% of tourists who were cycling had hired a bike for use on the greenway, which is another example of expenditure that supports small local businesses.

Greenways also support spending with local accommodation providers. 9% of surveyed greenway users had stayed overnight in the area near the greenway and their average length of stay was three days. Users who stayed overnight nearby predominantly stayed at a hotel, Airbnb or B&B/guesthouse, compared to other tourists who stayed with family or friends. Those staying in paid accommodation generally spent over €300 on their greenway trip.





- Over a month ago **70%**
- Over a week ago **12%**
- In the last few days **10%**
- Spontaneously decided today **6%**
- Other **2%**

Tourist trips to the greenway were usually decided a month in advance (70%). Tourists generally visited a greenway on a trip that was well planned out and did not have a high amount of spontaneity in the planning process. In comparison, locals using the greenways for a leisure trip are likely to have decided more recently.

Tourists who had planned their trip with a high degree of spontaneity made their decision largely based on the weather. An example being one tourist respondent who chose to stay on the train from Dublin to Westport to bring them to the Great Western Greenway instead as the weather was better there. Other tourists reported they had wanted to go for a cycle regardless of the weather.

"I wanted to cycle on the Grand Canal Greenway but the weather forecast was bad for that region."

– Great Western Greenway User

Greenways are popular with tourists. 85% of tourists said that the greenway was an important attraction for them to holiday in the greenway's locality. Furthermore, 9 in 10 tourists surveyed said they would use a local greenway if it were available in their home area or that they already use a greenway provided in their home area.

This result demonstrates that there is an appetite for more greenways across Ireland. When people on the Great Western Greenway were asked which greenway they would visit if the greenway they were on did not exist, the Waterford Greenway was the most popular, indicating a preference for coastal routes.





Greenways are more than just paths for recreation, they are dynamic assets that contribute to local economies, demonstrate social inclusivity, and influence tourism patterns.

Investment in greenways is greatly beneficial for society and the resulting infrastructure is a key asset for those living locally to enjoy outdoor activity.

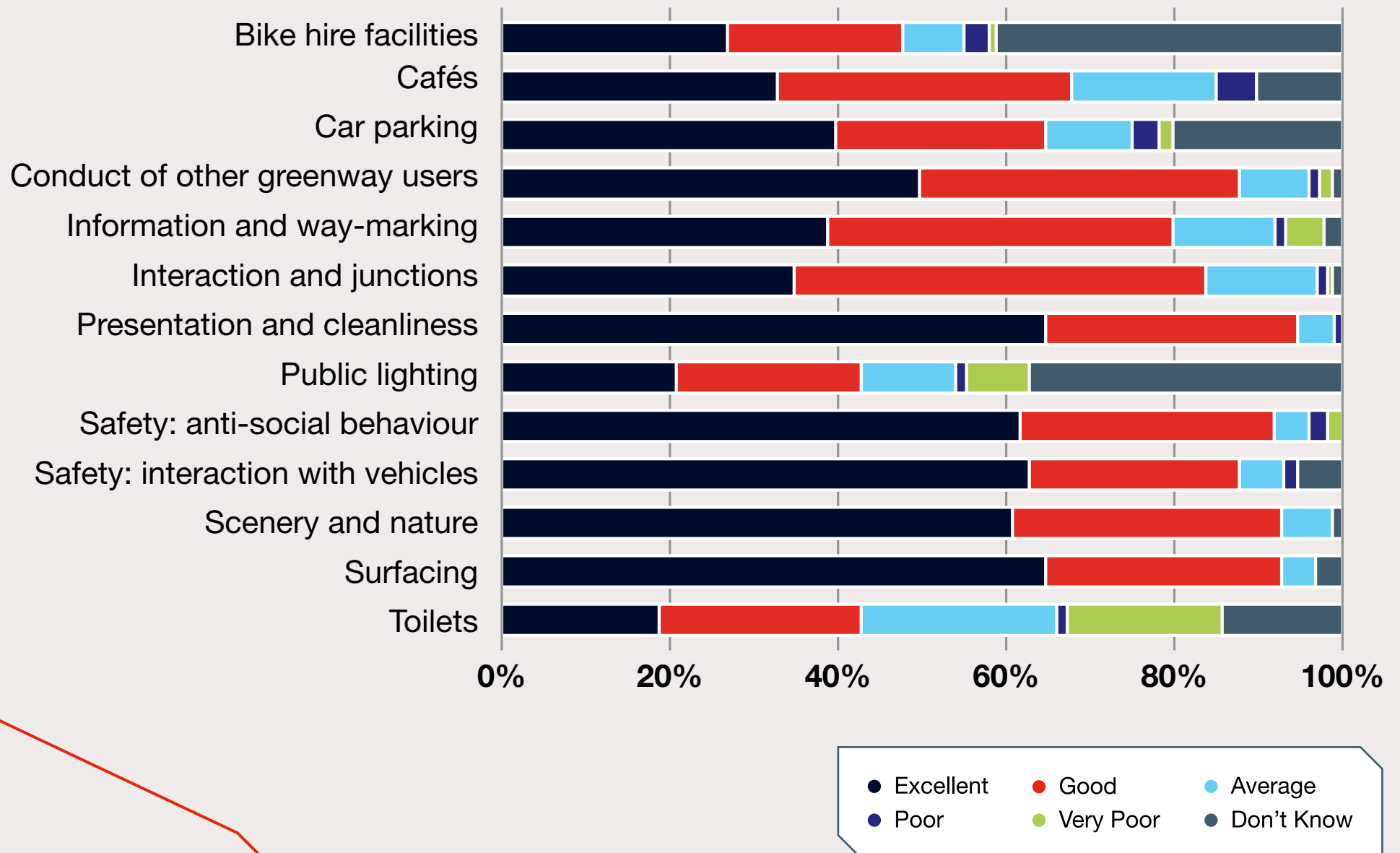
5 // Facility Ratings and Areas to Improve

Greenways have high satisfaction levels overall in terms of presentation and cleanliness. Scenery, presentation and surfacing received near unanimous endorsement with more than 92% good or excellent ratings. Over 85% of respondents also rated safety, and the conduct of other greenway users favourably.

This high satisfaction in the infrastructure of a greenway is a testament to the design and thought put into the construction and maintenance of the greenways.

Respondents were also asked if there was anything they disliked about the greenway. While most respondents stated that there was nothing they disliked, a number of items were recurring among those who did dislike something. These most commonly mentioned aspects included the access points, a lack of bins, a lack of toilets, cyclist behaviour and dog related issues.





Appendix A //

Where and when were surveys undertaken?

To date, the primary focus of the MOVE pilot has been 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 Co. Co)
- Waterford Greenway (Waterford Co. Co)

It is important to identify the extent of local and functional use of the greenways over the full year, as opposed to focusing only on occasional visitors. The survey periods have therefore been selected to capture seasonal impacts on the use of greenways as well as to monitor annual variations:

- Winter (December 2023 & December 2024)
- Spring (March/April 2024 & April 2025)
- Summer (June 2024 & June 2025)
- Autumn (September 2024 & September 2025)



How will results of MOVE be used?

The results of the surveys undertaken as part of MOVE will provide insights such as:

- Who uses greenways in Ireland?
- Why do people use greenways?
- How do people use greenways?
- What aspects of greenways are valued highly?
- Where can improvements be made?

This data will provide benchmarks for the usage of greenways and will assist TII in the planning and appraisal of future greenway schemes.

TII will use the results to improve existing economic and appraisal tools, and to develop new models for the appraisal of greenways in Ireland.







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