

## Wild Atlantic Way, Ireland<sup>1</sup>

### Best Practice Case Study - Product Development Initiative of Scale



### Background and Context

Tourism is a critical component of the economic health of the West of Ireland with the accommodation and hospitality sectors a key driver of employment. Indirectly, tourism supports key service sectors including retail, transport and food producers. It is also a sector that delivers substantial social and community benefits, particularly given the fact that most tourism businesses are micro-enterprises that are embedded in local communities. International tourism to the West of Ireland declined significantly in both visitor numbers and share of holiday visits to Ireland in the period 2007 -2010. This was further compounded by the challenging economic climate in Ireland since 2008.

In order to arrest and reverse this decline, overseas growth in tourism is required. In an attempt to achieve this, Fáilte Ireland has developed the Wild Atlantic Way as a tourism initiative of scale and singularity which will play a pivotal role in the delivery of Fáilte Ireland's overall strategic objectives of generating incremental international tourist revenues and job creation.

This Operational Programme sets out the goals and objectives for the Wild Atlantic Way for the period 2015-2019 and the actions that will be taken in order to deliver on them.



<sup>1</sup> [www.wildatlanticway.com](http://www.wildatlanticway.com)

## Consideration of Alternatives

As the National Tourism Development Authority, Fáilte Ireland needed to respond to the significant decline in international bednights and revenue in the west of Ireland that had occurred between 2007 and 2010, with a marketing initiative that would help to arrest and eventually begin to reverse this decline.

There were a number of options open to the Authority, all of which were considered. **Option 1** was to continue with a regional approach to tourism development in the west, with each of four regions competing with one another for market share, but all contributing to a large mix of experience brands which struggled for attention in the international marketplace. In terms of touring routes, over 35 were identified which touched upon the west coast, but only three of which crossed a county boundary. Any of the existing brands in the west of Ireland lacked the scale and singularity required to be noticed in overseas markets. This option could be classed as a 'do nothing' or a 'status quo' scenario. It was considered that pursuing this option would not result in a sufficient disruption of the downward trend in overseas bednights and revenue that was the case at the time. It was this 'status quo' option that had been in force when the decline occurred so there is no evidence to suggest that it would have the ability to arrest or reverse the decline.

**Option 2** was to focus future growth on those centres that are currently popular with visitors and try to grow them further. This option would involve the development of a single attraction of sufficient scale to focus attention on the west coast. Such an attraction would be of a scale similar to that of the recently developed Titanic Visitor Centre in Belfast. It was considered that such an approach would not provide a solution for the entire western seaboard and would not have the ability to sufficiently disrupt the geographical seasonal inequities that currently exist along the west coast. It was also considered that it would be more appropriate as part of a tourism development strategy for a large urban centre, as the Titanic Visitor Centre was for Belfast.

**Option 3** was to consider to have a single, overarching brand for the west of Ireland which would equip it with a greater potential to achieve 'cut-through' in target overseas markets by developing the concept of the Wild Atlantic Way as both a brand and a touring route. Comparator experiences such as the Great Ocean Road (Australia), the Garden Route (South Africa) and the Big Sur (North America) were all examined. The brand was tested and consumer groups responded very positively to it. In order to deliver on

the brand proposition, the route identified had to be a coastal route. As part of this Option, two further options were considered.

As part of this option, the development of a single walking route or Greenway (including cycling) was considered instead of a branded touring route. The model for this was the Wales Coast Path which was in development at the time. This constituted **Option 3a**. However, this option would constitute a significant level of new development in terms of cycleways and, therefore, presented barriers to the launch of the brand in 2014, as on-road cycling routes would not satisfy the needs or expectations of our core overseas markets. Other issues included land ownership and the possible requirement to seek planning permission, neither of which were insurmountable in principal, but not within the timescale allowed.



However, this Option 3a, in whole or in part, will still be considered as part of an objective of this Operational Programme. Building on the existing and planned network of coastal Greenways, walking routes and Blueways, Fáilte Ireland will co-ordinate the Local Authorities in their efforts to provide enhanced facilities for walking, cycling and kayaking, so that they tie in with the Wild Atlantic Way. In time, therefore, it is hoped that Option 3a will become a reality. In particular, Fáilte Ireland is exploring options with the National Trails Office and other partners, associated with the realisation of the Eurovelo 1 European Cycle route. In order to allow for this option to be part of the future implementation of the Wild Atlantic Way, the original name of 'Wild Atlantic Drive' was deliberately changed to 'Wild Atlantic Way' so that it would not imply to the visitor that the Wild Atlantic Way is just about

driving and that there are also options to explore the Wild Atlantic Way based on public transport, cycling, walking, and on the water.

Once it was decided that the first manifestation of the Wild Atlantic Way brand would be a branding of the existing roads along the west coast from County Donegal to County Cork, a further two sub-options were considered.

**Option 3b** was considered as part of the route identification process and involved only including those roads that were most scenic or which had largely unbroken views of the coast. This was the approach taken in identifying the 16 National Touring Routes in Norway. It was decided, however, that this might only serve to intensify visitors in already popular areas and might not achieve one of the goals of the initiative, namely to spread visitor bednights and revenue into areas where there is under-utilised capacity.

**Option 3c** was to identify a single, contiguous route along the entire west coast, from Co. Donegal to Co. Cork. It was deemed that this would create the necessary scale and singularity required for a brand that was to be visible in our key overseas markets. It was decided as part of this option to eventually identify and include a number of loops inland off the main spine within the first five years of operation. The reason why it was decided not to identify the loops immediately was because it was considered that it would result in a dilution of the brand during the formative years if a large portion of the route was in-land as opposed to predominately coastal and, thereby, not directly 'on-brand'.

The key environmental consideration in the route identification process, which included collective stakeholder decision-making and public consultation, was to ensure that the route to be chosen had to have the capacity to take two-way car, camper van and minibus traffic, while separate sections of the route were identified for coaches as appropriate. This was to avoid the selection of routes in sensitive areas that would require expansion or renewal works. Where roads along the coast with continuous sea-views were deemed to be too narrow, spurs from a wider road which ended in an existing beach car park or viewing point ('Discovery Point') were identified. This meant that even if the chosen route did not closely follow the coast due to capacity issues, the visitor was never very far at any one time from a view of the Atlantic.

Option 3c is the one that is currently being pursued, with the intention that the objectives at the core of Option 3a will also be implemented over time.

## Response: The Wild Atlantic Way

Tourism is an important industry in the west of Ireland, and has been for a long time. International visitors have been exploring the West Coast of Ireland as holiday makers for at least the last century and a half, as is evidenced from guide books from the period. In fact, in suggesting touring itineraries in Ireland, the 1914 edition of the *Michelin Guide of the British Isles*, focuses almost exclusively on the western counties and these itineraries follow many of the roads that have been identified as being part of the route of the Wild Atlantic Way. However, its fortunes can ebb and flow and those destinations in the west that are deemed popular can also change over time depending on visitor trends and destination life cycle.

The west coast has long held an appeal for both international and domestic holiday makers. Its rugged landscape, traditional culture and heritage, characterful towns and villages and friendly people are at the core of this appeal. However, as a destination, the west of Ireland is quite fragmented. Furthermore, the current level of co-operation between west coast destinations, for marketing purposes in particular, does not tend to extend beyond county boundaries. However, Fáilte Ireland's research indicates that overseas visitors have, in the main, no knowledge whatsoever of Ireland's local administrative arrangements and boundaries, nor do they care, so these industry groupings from an international marketing perspective are limited in their ability to gain traction in a crowded international tourism marketing landscape.



In an attempt to counter this trend, the Wild Atlantic Way was devised as a new 'experience' and 'destination' by Fáilte Ireland to present the West Coast of Ireland as a compelling international tourism product of scale and singularity. It is an over-arching brand which individual destinations and businesses can trade collectively with much greater potential visibility and clarity of message in the international marketplace.

The Wild Atlantic Way brand is manifest, in the first instance, through the identification of a coastal touring route which joins up a number of pre-existing routes as well as a large number of towns and villages, attractions and experiences along the west coast of Ireland. However, this branded touring route is only intended as the 'magnet' to which visitors will be drawn, but once in the west, their behaviour is likely to reflect that of the majority of visitors that currently visit the west of Ireland. That is, they will base themselves in one or two centres (but usually not more than two, which could be urban or rural) throughout the duration of their stay and will take time to explore the surrounding destination by car, bicycle or walking. It is unlikely that visitors will 'do' the entire Wild Atlantic Way by driving from one end to the other. While there will undoubtedly be a very small number that would wish to explore the Wild Atlantic Way in this manner, the need for the scale of the Way is (a) for it to be 'visible' in overseas markets and (b) for it to function as a device which has the ability to draw people back to the west of Ireland for a repeat visit (the 'Camino' effect). At present, repeat visits to the Wild Atlantic Way Programme Area and to Ireland in general are relatively low. 36% of holidaymakers on the Wild Atlantic Way had been to Ireland before, and this is slightly higher than the national average of 34% so it is an objective of the Wild Atlantic Way to increase the proportion of repeat visits to the Programme Area.

It is a clear objective of this Operational Programme to work with the Local Authorities and other relevant stakeholders to further improve the infrastructure and facilities for walking, cycling and water-based trails over the terms of this and subsequent Operational Programmes. In the meantime, and through the wide range of existing walking, cycling and water-based trails, in addition to the roads, the Wild Atlantic Way will be promoted as a way that visitors can see, explore, experience, participate and immerse themselves in the landscape, culture and communities of the west coast of Ireland.

## Programme Area

The Wild Atlantic Way encompasses the coastline and hinterland of the nine coastal counties of the West of Ireland – Donegal, Leitrim, Sligo, Mayo, Galway, Clare, Limerick, Kerry and Cork. The route itself stretches for almost 2,500km from the village of Muff on the Inishowen Peninsula in County Donegal to Kinsale in West Cork.

The immediate catchment of the Wild Atlantic Way is the area surrounding the spine of the route itself, the landmass to the west of the route as far as the coast and the immediate landmass to the east of the route.

While the immediate catchment of the WAW is the coastal zone, the Programme Area for the purpose of the Operational Programme is the totality of the nine coastal counties. This aids with monitoring and measuring given that most data, including tourism and environmental data sets, are most readily available at the level of the county.

In addition, a number of urban centres have been identified as gateways to the Wild Atlantic Way, namely; Cork, Killarney, Limerick, Ennis, Galway, Westport, Sligo, Donegal and Letterkenny, which, even though some are not located directly on the route, have an important role to play as key accommodation hubs which service the wider area in addition to having an appeal in their own right.



The route itself is the magnet or calling card to gain the attention of the international visitor, and acts as a device to entice people to the west of Ireland. Once there, visitors are encouraged to further explore and engage with tourism experiences and communities in a wider geographical area in the west of Ireland. In addition, a key objective of this Operational Programme is to identify a series of loops off the main route to further encourage visitors to explore the wider region and to increase the dwell time of international visitors.

At almost 2,500 km, the Wild Atlantic Way covers an extensive geographical area which can prove difficult for visitors to understand and consume in its entirety. For this reason six geographic zones have been identified to amplify different sections of the Wild Atlantic Way and to make it easy for consumers to orientate themselves based on their motivations. The presentation of the

Wild Atlantic Way through six geographic zones allows the travel trade to present the brand through a series of distinct geographies and itineraries.



## Staged Implementation

The first three stages of the project are complete, and the next three stages are being undertaken as parallel work streams. The proposition and brand identity have been developed and the route of the Wild Atlantic Way has been identified.



Trade and community engagement and activation



Throughout each stage of the process

## Strategy

### Vision

“To create a world class, sustainable and un-missable experience brand that engages and energises the visitor so that they become powerful advocates and leaves them wanting to return for more.”

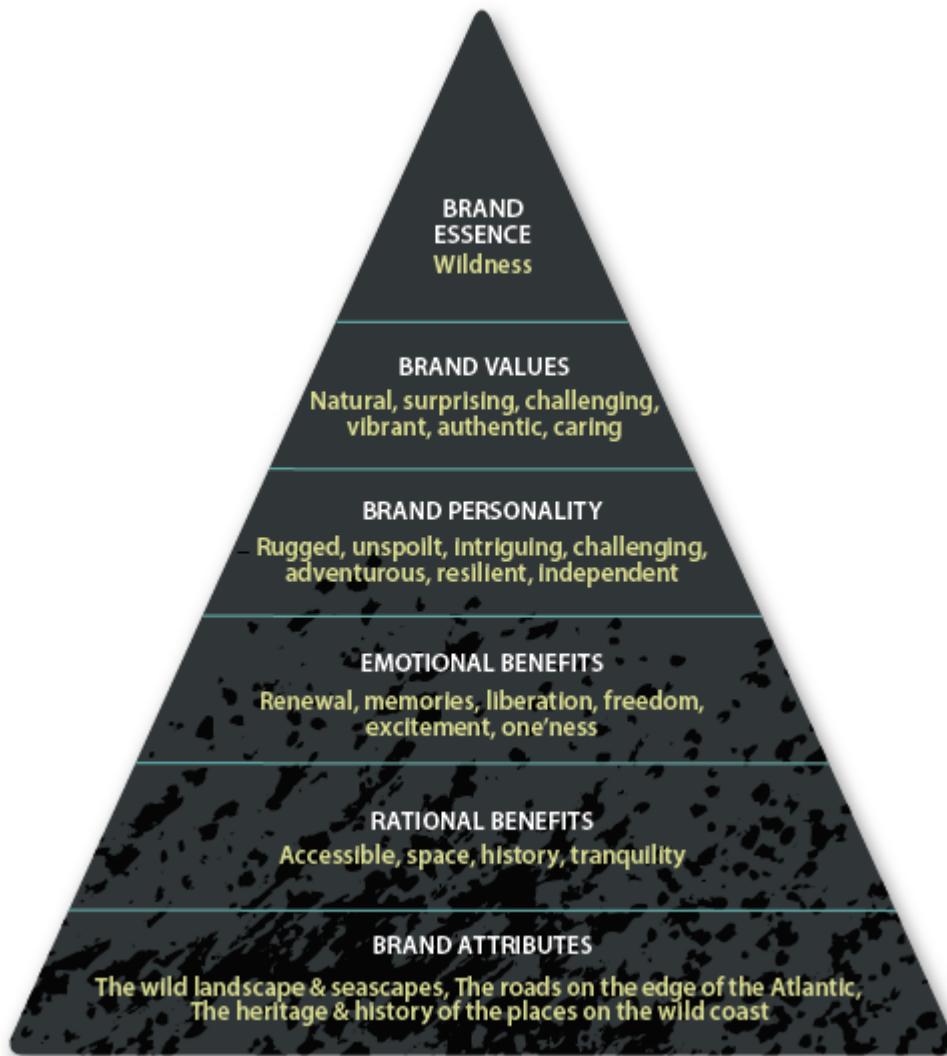
### Goals

The overall aim of the project is to develop a long-distance touring route that will achieve greater visibility for the west coast of Ireland in overseas tourist markets. The Wild Atlantic Way is one of Fáilte Ireland's signature projects to rejuvenate Irish tourism. Once fully-realised, the project will:

- assist in increasing visitor numbers, dwell time, spend and satisfaction along all parts of the route
- re-package the Atlantic seaboard as a destination to overseas and domestic visitors
- improve linkages between, and add value to, a range of attractions and activities
- improve on-road and on-trail interpretation, infrastructure and signage along and around the route
- direct visitors to less-visited areas
- build on the work completed in these areas already and assist businesses, agencies, local groups and other stakeholders along the area to work together
- reinforce the particular strengths and characteristics of all of the areas located along the west coast, while offering the visitor one compelling reason to visit

### Proposition and Brand

A brand proposition is the public face of the brand – it's what we say about the brand to its target markets. The central proposition of the Wild Atlantic Way is a coastal touring route between Kinsale on the southern end to the Inishowen Peninsula on the northern end. The Wild Atlantic Way proposition offers prospective visitors opportunities to discover an intriguing convergence of land and sea along 2,500kms of magnificent West of Ireland coastline. The longest defined coastal drive in the world, its wild and rugged natural beauty, unique ancient heritage, defiant settlements, creative locals and unique array of cultural events promise the visitor the journey of a lifetime. During this stage of the project, we also identified the key target markets, what they want from the Wild Atlantic Way and how to communicate it to them. A brand identity for the Wild Atlantic Way has been developed (see below).



## 2016 Work Plan

The key challenges facing the Wild Atlantic Way in 2016 are as follows:

1. Raising of the Wild Atlantic Way
2. Shoulder Season Extension
3. Regional Spread of Visitors

### International Awareness

Tourism Ireland will continue to promote the Wild Atlantic Way internationally as part of their ongoing marketing communications plan. In addition to this activity Fáilte Ireland will establish a Public Private International Marketing Fund to design and implement a dedicated Wild Atlantic Way consumer marketing campaign to increase awareness levels and generate incremental international bednights. Fáilte Ireland will work with Tourism Ireland on the implementation of this campaign.

## Domestic Consumer Marketing

While the Wild Atlantic Way experience brand is well established here on the ground in Ireland, we can't afford to become complacent. With this in mind we will implement a strong digital campaign in Spring 2016 to keep Wild Atlantic Way top of mind in the key booking periods. This will be followed up by a dedicated multi media campaign aimed at encouraging shoulder season breaks in Autumn 2016.

## Season Extension Initiatives

A big challenge for many of the communities along the Wild Atlantic Way is the duration of the season which can be as little as 8 weeks outside the traditional well established tourism hubs. In 2016, Fáilte Ireland will identify a number of areas to implement season extension initiatives with the objective of encouraging businesses to stay open longer at the back end of the season (mid September to end October).

## Signature Experience Plans

In 2016, the Wild Atlantic Way team will commence work on the development of a suite of Experience Development Plans. These will be adopt either a "geographic" or "thematic" approach. It is intended that the plans will be tangible action plans that can be implemented over a 2-3 year period and will be developed as "hero" tourism product at the heart of each plan. Each "hero" product(s) will be supported by a range of Supporting Visitor Experiences that will encourage visitors to spend longer in a particular area. These visitor experiences will be underpinned by a variety of accommodation, hospitality and other key services that will all bring the Wild Atlantic Way proposition to life.

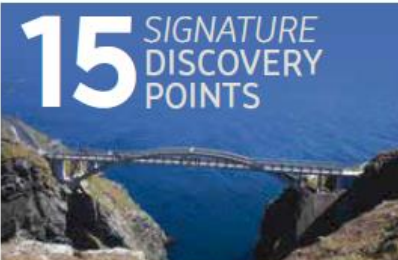


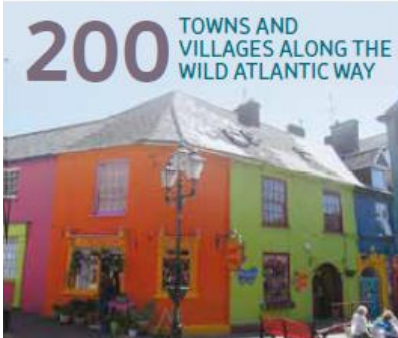

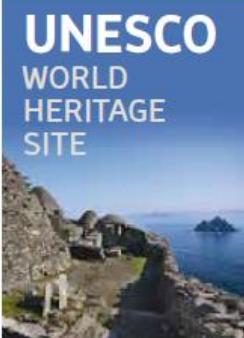
## Industry Capability Building

Fáilte Ireland will deliver a comprehensive range of Business Supports to tourism businesses along the Wild Atlantic Way to support capability building and to ensure our partners are well equipped to exploit all opportunities presented by the Wild Atlantic Way. Supports will be delivered across a variety of topics including Sales & Distribution, Revenue Management, Cross Promotion & Cross Selling, Digital Supports, Wild Atlantic Way Ambassador Programmes and Customer Care.





**WILD ATLANTIC WAY**  
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# Wild Atlantic Way Highlights

<p>LONGEST DEFINED COSTAL TOURING ROUTE IN THE WORLD STRETCHING</p> <h2 style="margin: 0;">2,500km</h2> <p>FROM INISHOWEN IN DONEGAL TO KINSALE IN WEST CORK</p>	 <h2 style="margin: 0;">188</h2> <p>DISCOVERY POINTS</p>	<h2 style="margin: 0;">15</h2> <p>SIGNATURE DISCOVERY POINTS</p> 
 <h2 style="margin: 0;">200</h2> <p>TOWNS AND VILLAGES ALONG THE WILD ATLANTIC WAY</p>	<h2 style="margin: 0;">FIVE</h2> <p>NATIONAL PARKS</p>	<h2 style="margin: 0;">6</h2> <p>GAELTACHT REGIONS</p> 
 <h2 style="margin: 0;">26</h2> <p>OFFSHORE ISLANDS</p>	<p>KERRY IS ONE OF ONLY THREE LOCATIONS WORLDWIDE DESIGNATED AS A</p> <h2 style="margin: 0;">GOLD TIER DARK SKY RESERVE</h2> <p>— ONE OF THE BEST LOCATIONS IN THE WORLD FOR STAR GAZING!</p>	<p>THE BEST PLACE TO</p> <h2 style="margin: 0;">GO WILD IN IRELAND</h2>  <p>ERRIS, CO. MAYO</p>
<h2 style="margin: 0;">UNESCO</h2> <p>WORLD HERITAGE SITE</p> 		

## WORLD RESPONSIBLE TOURISM AWARDS




 <p><b>LOOP HEAD</b> Best Cultural Heritage Attraction</p>	 <p><b>CNOC SUAIN</b> Best Cultural Heritage Attraction</p>	 <p><b>CONNEMARA WILD ESCAPES</b> Best for engaging people and culture</p>
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