

WILD  
ATLANTIC WAY  
**REGIONAL**  
TOURISM DEVELOPMENT  
STRATEGY 2023 - 2027







# CONTENTS

<b>EXECUTIVE SUMMARY</b> .....	<b>1</b>
<b>SECTION 1. INTRODUCTION AND CONTEXT – ABOUT THIS STRATEGY</b> .....	<b>11</b>
1.1. REGIONAL TOURISM DEVELOPMENT STRATEGY OVERVIEW .....	12
1.2. WILD ATLANTIC WAY AND SUCCESS TO DATE .....	14
1.3. STRATEGIC CONTEXT .....	16
1.4. REGIONAL RECOVERY AND GROWTH FORECAST .....	17
<b>SECTION 2. WILD ATLANTIC WAY – VISION FOR THE FUTURE</b> .....	<b>21</b>
2.1. OUR VISION FOR THE WILD ATLANTIC WAY.....	22
2.2. OUR STRATEGIC CHALLENGE .....	22
2.3. OUR STRATEGIC OBJECTIVES.....	23
2.4. ACHIEVING OUR VISION FOR THE WILD ATLANTIC WAY.....	24
<b>SECTION 3. WILD ATLANTIC WAY – STRATEGIC FRAMEWORK</b> .....	<b>29</b>
3.1. STRATEGIC FRAMEWORK 2023 – 2027 .....	30
3.2. SUSTAINABILITY, CLIMATE ACTION AND SUSTAINABILITY STRATEGY.....	32
3.3. VISITOR STRATEGY .....	34
3.4. BRAND STRATEGY.....	39
3.5. DESTINATION DEVELOPMENT STRATEGY .....	40
3.6. PRODUCT DEVELOPMENT STRATEGY .....	51
3.7. INDUSTRY DEVELOPMENT STRATEGY .....	60
3.8. DISTRIBUTION AND BUSINESS DEVELOPMENT STRATEGY .....	64
3.9. MARKETING STRATEGY.....	67
3.10. COMMUNITY ENGAGEMENT .....	71
3.11. ENVIRONMENTAL PROTECTION & PROMOTION.....	74
<b>SECTION 4. MEASURING SUCCESS</b> .....	<b>81</b>
4.1. MEASURING SUCCESS.....	82
<b>SECTION 5. APPENDICES</b> .....	<b>87</b>
5.1. APPENDICES .....	88





# EXECUTIVE SUMMARY



Donegal

Leitrim

Sligo

Mayo

Galway

Clare

Limerick

Kerry

Cork







## EXECUTIVE SUMMARY

### STRATEGIC CONTEXT

The Wild Atlantic Way Regional Tourism Development Strategy 2023 – 2027 is a roadmap for the tourism industry and all stakeholders involved in the region to navigate the current challenges and steer a course towards recovery and future success.

This strategy has been prepared during a time of unprecedented uncertainty. Despite having weathered the disruption caused by Brexit and Covid-19 the industry now faces an acute energy crisis resulting in further uncertainty.

One of the most important aspects of this strategy will be to support our tourism providers with the skills they need to navigate an uncertain operational environment and to be prepared to seize the opportunity when it presents itself. In recognising the challenges facing the industry in terms of labour shortages and rising input costs, we will deliver supports in a number of ways. These include Account Management, Network and Cluster Development and the implementation of National Support Programmes.

This Regional Tourism Development Strategy 2023 – 2027 replaces the previous **Wild Atlantic Way Operational Programme 2015 – 2019** and is primarily informed by the Government’s Tourism Strategy **People, Place and Policy: Growing Tourism to 2025**, Fáilte Ireland’s **Corporate Strategy 2021 – 2023**, and the report of the Sustainable Tourism Working Group **Actions to Promote Sustainable Tourism Practices 2021 – 2023**.

The Strategy is also informed by planning policy (the National Planning Framework (NPF), Regional Spatial and Economic Strategies (RSEs) and lower tier Development Plans and Local Area Plans). It sets out a strategic approach to unlock the commercial potential of the Wild Atlantic Way while ensuring that this development is sustainable, that the benefits accrue to local communities, and that our natural environment is protected.

### WILD ATLANTIC WAY IN CONTEXT

The Wild Atlantic Way was launched in 2014 in response to a crippling global recession which left the tourism economy on the west coast of Ireland facing sustained challenges with declining coastal communities and a tourism season of no more than six weeks in many places. The brand was designed to create a product of scale that would re-imagine the west coast. It would unify it through a continuous, defined route and package it in a way that would motivate visitors to holiday there, and provide an economic engine for the west.

The clarity and authenticity of the brand resonated immediately with local communities, businesses and visitors alike. From the outset, a strong sense of ownership of the brand existed among local communities, there was good brand adoption among the industry and this was supported by positive feedback from visitors on the overall experience.

In 2019, the Wild Atlantic Way attracted one million more international visitors than in 2014 when the brand was launched. The value of tourism in 2019 grew to €3bn for the local communities and industry. International visitors accounted for two thirds of that revenue with the sector sustaining over 80,000 jobs. In many areas across the Wild Atlantic Way region, tourism is the largest employer accounting for up to 1 in 4 jobs.

Nevertheless, the Wild Atlantic Way remains a “young” brand with plenty of opportunity for further economic growth, particularly in the northern half of the Wild Atlantic Way. The brand continues to prove attractive to all consumer segments providing the platform for continued destination and experience development.



## OUR AMBITION

Our ambition for this strategy is to drive recovery and growth in the Wild Atlantic Way region. We want to recover and grow the visitor economy to create sustainable, high-quality jobs in the sector that will serve to support and strengthen local communities while protecting our natural environment. This will be achieved by targeting domestic and international visitors who will stay longer in the region, spend more and/or who will arrive in off-peak periods.

While 2022 is a relatively strong year due to pent-up demand and deferred bookings, 2023 and beyond are expected to be more challenging. Forecasting the rate and pace of recovery and growth is difficult. At a minimum we expect a return to 2019 levels of revenue by 2026, in inflation adjusted terms, with an ambition to exceed this.

We expect an additional 5% supply side capacity (accommodation, visitor attractions, activity providers, etc.) to come on stream over the period of this strategy, which would be achieved through greater optimisation (e.g., longer opening hours/season) and new stock.

It is Fáilte Ireland's long-term objective to ensure a greater regional spread of the socio-economic benefits of tourism across the country. For the Wild Atlantic Way, this means growing tourism revenue at a faster rate in areas that are currently less visited relative to the more popular destinations over the period of this strategy, while staying within existing infrastructural and environmental capacities. While the short-term focus is on recovery in all areas, as the recovery progresses we will set more specific regional targets which will be considered at the mid-term review of this strategy, informed by the Department of Tourism, Culture, Arts, Gaeltacht, Sport & Media and by Tourism Ireland's and Fáilte Ireland's new statements of strategy which are due to be delivered in 2023/24.

## THE VISION

It's 2033 and the Wild Atlantic Way is internationally renowned for its spectacular seascapes, raw beauty and warm hospitality. It ranks as one of the top five touring routes in the world with its rugged coastline, unique Irish culture, traditions, and friendly people at the heart of its offering. Visitors are enjoying all parts of the Wild Atlantic Way and dispersal along the route and into towns and villages in the region has become more evenly spread.

Visitors to the Wild Atlantic Way talk of being inspired and enriched by memorable engagement with these vibrant and creative communities whose lives and traditions have been shaped by the Atlantic. They talk of the wildness and beauty of the west coast and the abundance of ways to enjoy the great outdoors both on land and by sea. They value the freedom and energy it gives them to feel fresh salty air, explore sea cliffs and caves, walk and cycle wonderful coastal trails, uncover hidden beaches, sample the best of seafood and immerse themselves in living culture.

## THE CHALLENGE

The strategic challenge for the Wild Atlantic Way is to grow its appeal as a globally iconic, "must do" touring route, driving incremental bed-nights and longer stays into the region while protecting the cultural authenticity and wildness of the west coast. For the northern half of the Wild Atlantic Way (from Connemara, Co. Galway to Co. Donegal inclusive) there is a need to raise its profile internationally and grow incremental overseas visitor revenue. For the southern half of the Wild Atlantic Way (from Galway City, Co. Galway to Kinsale, Co. Cork inclusive) the challenge is to sustainably increase tourism revenue, extend the season and disperse visitors more widely within the region, minimising any adverse impacts on local communities and maximising benefits for them.



## STRATEGIC APPROACH

The Wild Atlantic Way Regional Tourism Development Strategy will achieve its tourism ambition for the region through the following strategic objectives:

### STRATEGIC OBJECTIVE 1: YEAR-ROUND APPEAL.

Grow the year-round appeal of the Wild Atlantic Way domestically and internationally ensuring we attract and disperse high-value visitors into and throughout the region.

### STRATEGIC OBJECTIVE 2: INTERNATIONAL PROFILE.

Raise the international profile of the northern half of the Wild Atlantic Way to increase visitation and revenue.

### STRATEGIC OBJECTIVE 3: REVENUE, DISPERSION & EXTENSION.

Increase tourism revenue, visitor dispersion and season extension across the southern half of the Wild Atlantic Way.

### STRATEGIC OBJECTIVE 4: AUTHENTICITY & "WILDNESS"

Protect the cultural authenticity and "wildness" of the Wild Atlantic Way.

### STRATEGIC OBJECTIVE 5: CAPACITY & CAPABILITY.

Enable and assist the industry to grow its capacity and capability so that it can thrive over the period of this strategy.

### STRATEGIC OBJECTIVE 6: INDUSTRY & STAKEHOLDER.

Foster strong coalitions of industry and stakeholders with a common purpose in creating flourishing destinations and thriving communities while also building a sustainable model of destination development across the Wild Atlantic Way.

The strategy is supported by comprehensive investment in new and existing product which will enable us to achieve the strategic objectives for the Wild Atlantic Way. More than €60m in capital funding has already been committed to tourism

projects which will be realised over the lifetime of this strategy and further funding will be sought based on the particular needs of each destination as identified in our Destination & Experience Development Plans.



## SUSTAINABILITY, CLIMATE ACTION AND SUSTAINABILITY STRATEGY

The principles of sustainable tourism have been placed at the heart of this Regional Tourism Development Strategy through the adoption of the VICE Model for Sustainable Tourism. The VICE model focuses on the interaction between Visitors (V), the Industry (I) that serves them, the Community and culture that hosts them (C) and their collective impact on and response to the Environment (E) to guide the future sustainable development of tourism. Sustainability in tourism demands rethinking tourism success and mainstreaming sustainable tourism policies and practices.

For the Wild Atlantic Way, the most important sustainability challenge will be to achieve more balanced regional development of tourism. It must keep within environmental capacities and ensure tourism activities do not impact negatively on sensitive environments, habitats and species, or on local communities. Given that the tourism offering is largely based on the natural and built heritage, it is crucial that the quality, character and distinctiveness of these assets are protected, and any development

enhances and protects the wildness of the landscape which is at the heart of its offering. We will also place a particular emphasis on the development and promotion of eco-tourism experiences.

Decarbonising the tourism sector is also a key priority of this strategy. Fáilte Ireland is committed to working towards ensuring that the tourism sector plays its part to help deliver Ireland's commitments under The Paris Agreement on Climate Change and under Ireland's **Climate Action Plan 2021**. Fáilte Ireland will adhere to these plans during the lifetime of this strategy.

The significant challenges faced by tourism businesses over the next five years to reduce their CO<sup>2</sup> emissions will also be addressed. Fáilte Ireland will work with a number of other State agencies, such as SEAI, and industry groups to support the industry in reaching its carbon reduction targets. We will also support the uptake of sustainability measurement and certification programmes at both enterprise and destination level.



## VISITOR STRATEGY

Our visitor strategy will be guided by a new visitor segmentation model and a clear understanding of consumer motivations for travel through continuous visitor research. This will provide new opportunities for differentiated approaches in the marketing and promotion of the Wild Atlantic Way.

The focus for the northern half of the region is to attract more international visitors from continental Europe. There will also be an increased focus on attracting international golf tourists based on the quality of, and investment in, the golf product here. Domestically and in the Northern Ireland market, the focus will be placed on targeting greater numbers of higher spending unconstrained adults and families. This will be supported by initiatives to encourage increased numbers of short breaks across the shoulder season.

The visitor strategy for the southern half of the Wild Atlantic Way will focus on growing year-round footfall among the domestic market and growing international visitor numbers from North America and mainland Europe. It will diversify into more luxury and “slow tourism” visitors from these core markets with the aim of attracting higher-spending and longer-staying visitors.

We will continue to work with the four key convention bureau in Galway, Shannon, Kerry & Cork to attract increased high-yield business visitors across the association conference, incentive and corporate meeting segments. Attractive cities and towns across the region will also provide opportunities in the younger and older unconstrained adult markets.

## DESTINATION AND PRODUCT DEVELOPMENT

Over the next five years, we will have created sixteen Destination and Experience Development Plans (DEDPs) which will ensure every part of the region has a tourism development plan. Every destination is different and at a different level of maturity. These plans will ensure that the solutions proposed are designed to meet the particular needs of the destination in question and that each destination can reach their full potential.

A number of destinations already have plans in progress. DEDPs will also be subject to environmental assessment as appropriate.

The destinations in the southern half of the Wild Atlantic Way are very well recognised among the domestic market and also possess high international recognition levels. The destinations in the northern half are generally less well recognised in both domestic and international markets, with a few notable exceptions.

In the northern half the focus will be on developing iconic attractors that will differentiate the region and boost its appeal. Across the southern half of the Wild Atlantic Way, the emphasis will be on the continued creation of compelling visitor experiences to encourage greater visitor dispersal, visitor management plans for key visitor attractions and an increased number of quality indoor attractions to encourage longer dwell time and year-round visitation. This strategy will see the completion of a number of Fáilte Ireland investments which are already underway. There will be a continuous focus on the development of new and pipeline projects for all of the Wild Atlantic Way Region in line with the needs of each destination.

We will work closely with our strategic partners and the Office of Public Works (OPW), National Parks & Wildlife Service (NPWS), Údarás na Gaeltachta, Coillte and future partners. This will help to unlock the tourism potential of a range of State-owned natural and built assets in a sustainable way and provide a good range of signature visitor experiences in each destination. An enhanced outdoor product base will be developed through a growing network of water sports facilities at key beaches and harbours.

We will support the private sector in leveraging the continued investment and growth of our greenway and blueway networks. Opportunities to deliver world class coastal boat experiences will be developed to add to our marine tourism product base.

A framework will be developed to guide the creation of the Wild Atlantic Way Coastal Path through upgrading and enhancing existing coastal trails, and other planned initiatives such as looped driving routes and food trails will support the dispersal of visitors deeper into our Wild Atlantic Way communities.

## COLLABORATION

The key to the success of this strategy will be the strength of collaboration between all partners that include the tourism industry, local authorities, State agencies, private sector and community groups. The strategy will require close collaboration with the Ireland's Hidden Heartlands and Ireland's Ancient East regional teams that will result in the development and promotion of new touring routes and itineraries to encourage new visitor flows and open up opportunities for less-visited destinations.

Over the course of this regional tourism development strategy, Fáilte Ireland will work closely with its partners to ensure the Wild Atlantic Way brand promise is delivered to a high standard across all touchpoints in the visitor journey. We will work with our tourism industry to ensure they are supported to grow and maintain competitiveness through collaboration at a destination level and are primed to deliver on the agreed outputs of their destination plan.

## INDUSTRY CAPABILITY

One of the most important parts of this strategy will be to support our tourism providers through provision of the skills they need to navigate an uncertain operational environment and to be prepared to seize the opportunity when it presents itself. In recognising the challenges facing the industry in terms of labour shortages and rising input costs, we will deliver supports in a number of ways including Account Management, Network and Cluster Development and the implementation of National Support Programmes. Sales and Distribution Plans will be prepared for each of the DEDPs on the Wild Atlantic Way. The focus of the Distribution Plans will be to build on the progress made with the international market and grow engagement with the domestic market, particularly in the shoulder seasons.

The emphasis for the southern half of the Wild Atlantic Way is to ensure the product remains refreshed and exciting for visitors and tour operators.

The northern half of the Wild Atlantic Way will concentrate on establishing new and incremental business opportunities. Support will be provided for businesses to help shape their products for different distribution channels and build their sales and contracting skills in advance of engaging with buyers.

## COMMUNITY

The landscape, people and communities that live along the west coast of Ireland, together with their culture and heritage, are key assets of the Wild Atlantic Way. They have played a huge role in driving its success to date. The region is reliant on authentic community-based tourism enterprises to provide a wide range of visitor experiences. These community enterprises and local experiences deliver a wide range of economic, social, cultural and environmental benefits, together with ensuring a highly authentic experience for our visitors. We will support these enterprises appropriately to ensure they can be sustained over the long-term.

This strategy will build on the goodwill among local communities for tourism, communicating the socio-economic benefits that well-managed and sustainable tourism brings locally. Visitors will continue to be provided with new opportunities to meet local people, hear their stories and interact with nature, cultural heritage and outdoor activities, strengthening the brand proposition of the Wild Atlantic Way.



## ENVIRONMENTAL PROTECTION & PROMOTION

The protection, enhancement and promotion of our most important tourism asset, the natural environment, has been an integral part of the formation of this strategy.

The Regional Tourism Development Strategy for the Wild Atlantic Way provides a new context for how all existing and future tourism projects and initiatives are planned, developed and managed in a sustainable and integrated manner. The wildness of the landscape is at the heart of the Wild Atlantic Way offering. It is crucial that the quality, character and distinctiveness of these natural assets are protected.

It is imperative to ensure the conservation and maintenance of key elements of biodiversity as part of any development projects to ensure they do not contribute to biodiversity loss or deterioration. Integrating requirements for environmental protection and management form a core part of this approach.

Strong visitor management and the pursuit of value over volume will play a key role in enabling visitors to enjoy the spectacular seascapes in a manner that will protect it for future generations. A strong focus will be placed on reducing the carbon footprint of destinations and helping tourism businesses improve their environmental performance. We will also continue to work with the industry to develop a strong and innovative eco-tourism experience base in the region, learning from great models such as the Burren Eco-tourism Network.

The potential impacts on the environment that could arise from implementing this regional tourism development strategy have been fully assessed through a Strategic Environment Assessment.

An environmental monitoring programme has been established to monitor any impacts that might arise over the course of the strategy period.







# 1. INTRODUCTION AND CONTEXT – ABOUT THIS STRATEGY



## 1.1. REGIONAL TOURISM DEVELOPMENT STRATEGY OVERVIEW

The Regional Tourism Development Strategy (RTDS) represents a 5-year vision for the sustainable development of tourism in Ireland's Wild Atlantic Way, together with a 5-year strategy towards the achievement of that vision. It identifies the elements required at a strategic level to unlock the commercial potential of the region while exceeding the expectations of our visitors, protecting the environment, and enhancing the lives of local communities. The strategy provides a guiding strategic framework for other more detailed tourism development plans that will be prepared within the region over the next five years, including Destination and Experience Development Plans (DEDPs) and County Tourism Strategies.

The Wild Atlantic Way region is comprised of a number of distinctive destinations at different levels of maturity and different stages of development. Central to this strategy is a new approach to destination development which recognises the issues and challenges facing a destination are linked to its level of maturity.

This requires destination development plans to be nuanced to reflect the needs and growth opportunities in each destination. This will ensure that the correct type and mix of interventions and supports for the destination are put in place and future development is sustainable, relevant and successful for the destination.

Developing destinations is complex and multi-faceted with a myriad of different stakeholders involved with a wide range of touchpoints that impact on the quality of the visitor experience. This includes visitor attractions, activities and accommodation, visitor facilities and services.

The destination experience is further enhanced by the quality of its physical and digital infrastructure and the quality and accessibility of its landscapes and streetscapes. Attractive destinations for visitors are first and foremost high-quality environments and great places to live and work for locals.



It is the combination of these building blocks that shape the overall destination offering which are in turn sustained by the actions of many bodies serving the need of both citizens and visitors.

A strong partnership approach among all stakeholders centred around a clear vision is key to creating strong sustainable destinations. This works when local authorities, community groups, industry groups and State agencies all come together around a shared vision and a willingness to work together to sustainably develop the destination.

Fáilte Ireland consulted widely with industry and stakeholders in preparing this regional tourism strategy. As part of the process, 650 industry partners from across the region responded to a survey to help identify the key challenges facing the sustainable development of the Wild Atlantic Way over the coming years. Fáilte Ireland has also taken into account the findings of the Strategic Environmental Assessment (SEA) which are detailed in the accompanying SEA Environmental Report.

## DISTINCTIVE DESTINATIONS



Source: Fáilte Ireland.



## 1.2. WILD ATLANTIC WAY AND SUCCESS TO DATE

The Wild Atlantic Way was launched in 2014 in response to a crippling global recession when the tourism economy on the west coast of Ireland faced sustained challenges with declining coastal communities and a tourism season of no more than six weeks in many places.

The brand was a mechanism to re-imagine the west coast, to unify it through a continuous, defined route and package it in a way that would motivate visitors to holiday there and provide an economic engine for the west. The clarity and authenticity of the brand resonated immediately with local communities, industry partners and domestic visitors alike with strong brand adoption from the outset.

The Wild Atlantic Way route itself is intended as the “magnet” to which visitors will be drawn to the west coast in the first instance with a layer of varied and authentic experiences beneath this offering visitors plenty of reasons to explore the wider region, stay longer and enjoy the Wild Atlantic Way all year round. Now that the Wild Atlantic Way brand is well established, the intention is to leverage it even further for the benefit of all the west coast region.

Internationally, the brand has proven itself to be particularly compelling in the Great Britain, German and French markets but has also begun to take hold in the US with revenue from North America now ahead of that of mainland Europe.

**One million more international visitors** came to the Wild Atlantic Way in 2019 versus 2014. In all international consumer testing, the brand showed itself to be a motivating reason to visit Ireland and domestically it has become a household name.

Nevertheless, it remains a “young” brand with plenty of opportunity for growth, particularly in the northern half of the Wild Atlantic Way which has a low profile in the international markets. The brand itself is attractive to all consumer segments with opportunities to increase repeat visitors to lesser-known areas along the route and attract incremental high spending tourists.



€3bn

VALUE OF TOURISM IN WILD ATLANTIC WAY REGION

66%

PERCENTAGE OF REVENUE GENERATED BY OUT OF STATE TOURISTS IN WILD ATLANTIC WAY (OVERSEAS PLUS NI TOURISTS)

33%

REVENUE GENERATED BY REPUBLIC OF IRELAND TOURISTS IN WILD ATLANTIC WAY

80,000

TOURISM JOBS SUPPORTED

36%

SHARE OF TOTAL OVERSEAS TOURISTS TO IRELAND

43%

SHARE OF TOTAL DOMESTIC TRIPS IN IRELAND



## 1.3. STRATEGIC CONTEXT

**The Wild Atlantic Way Regional Tourism Development Strategy 2023 – 2027** is a roadmap for the industry and all stakeholders involved in tourism in the region to navigate the current challenges and steer a course towards recovery and continued success.

It is primarily informed by a number of important strategies, primarily the Government’s Tourism Strategy **People, Place and Policy: Growing Tourism to 2025**, the Department of Tourism, Culture, Arts, Gaeltacht, Sports and Media **Statement of Strategy 2021 – 2023** and Fáilte Ireland’s **Strategy to 2023 – from Survival to Recovery** and the report of the Sustainable Tourism Working Group **Actions to Promote Sustainable Tourism Practices 2021 – 2023**. This strategy is also informed by planning policy (the National Planning Framework, the Regional Spatial and Economic Strategies and lower tier plans). It is also anticipated that during the life of

this strategy, forthcoming national policies and/or strategies, specifically those which reflect a need for responsiveness in light of evolving climate change legislation may impact aspects of the RTDS. These include the development and publication of a new Government Tourism Policy which mainstreams sustainability and aligns with the 2021 Climate Action Plan, Tourism Ireland’s forthcoming (2023) Corporate Strategy and Fáilte Ireland’s own Corporate Strategy which expires at the end of 2023. The Wild Atlantic Way RTDS will review and respond appropriately to these policies and strategies on an ongoing basis.

Fáilte Ireland’s corporate strategy seeks to steer the industry back to recovery following the Covid-19 global pandemic. It sets out a course of action based on the following eight strategic pillars, from which this regional tourism development strategy takes its cue:

1	To sustain tourism businesses in the short term so they can thrive over the long term.	Survive to Thrive.
2	To support industry to attract and retain talent to support sustainable growth.	Supporting Tourism Careers.
3	To achieve a sustained step change in Irish stay-cations.	Accelerate Domestic Tourism.
4	To transform Ireland’s outdoor tourism experience.	Opening the Outdoors.
5	To transform Irish tourism’s online presence and e-commerce capability.	Digital that Delivers.
6	To enhance the destination experience and support the industry in building a pipeline of future international business.	Destination Development and Distribution.
7	To reduce the carbon footprint of the tourism sector and make it much more sustainable.	Driving Climate Action.
8	To ensure our delivery is best in class.	Delivering Excellence.

The strategy that follows for the Wild Atlantic Way serves to deliver on each of the above eight strategic pillars.



## 1.4. REGIONAL RECOVERY AND GROWTH FORECAST

Forecasting is very difficult in the current economic environment, particularly in the midst of rapidly rising energy costs. While we have made the following recovery and growth forecast for the Wild Atlantic Way using the best available data to hand, we will ensure that we keep these predictions under periodic review and update them regularly.

During the pandemic, domestic trips taken by the Irish population remained resilient when travel was permitted, greatly helping the industry to survive the crisis. Accordingly, the upside potential of the home market is less than that of the overseas market. While there is a risk that the domestic market may experience a dip in 2023 due to demand for international travel, over the medium term it is anticipated that domestic trips will reach a new peak. The opportunity now exists to convert these into loyal repeat visitors to the Wild Atlantic Way taking more annual short breaks.

Given Ireland's high reliance on overseas visitors, real recovery to pre-pandemic levels will only be possible when international tourism returns. The overseas market is likely to recover relatively slowly as connectivity returns. 2022 levels of business are likely to be approximately 60% of 2019 nationally but this includes business carried over from 2020 and 2021, so recovery is likely to slow in 2023 and our best estimate is that demand will be back to 2019 levels by 2026. In the early days of international travel re-opening, overseas visitors are more likely to return to Ireland's traditional hotspots first, before exploring the lesser-known areas in greater numbers.

### OUR AMBITION

Our ambition for this strategy is to drive recovery and growth in the Wild Atlantic Way region. We want to recover and grow the visitor economy to create sustainable, high-quality jobs in the sector that will support and strengthen local communities while protecting our natural environment. This will be achieved by targeting domestic and international visitors who will stay longer in the region, spend more and/or who will travel in off-peak periods.

Considering the restrictions in place in Q1, 2022 has been a strong year across the region aided by pent-up demand and deferred bookings from the previous two years. 2023 and beyond are expected to be challenging yet more predictable in terms of booking patterns. Forecasting the rate and pace of recovery and growth is difficult but at a minimum we expect a return to 2019 levels of revenue by 2026, in inflation adjusted terms, with an ambition to exceed this.

We expect an additional 5% supply side capacity (accommodation, visitor attractions, activity providers, etc.) to come on stream over the period of this strategy, which would be achieved through greater optimisation (e.g., longer opening hours/season) and new stock.

### REGIONALITY

It is Fáilte Ireland's long-term objective to ensure a greater regional spread of the socio-economic benefits of tourism across the country. For the Wild Atlantic Way, this means growing tourism revenue at a faster rate in areas that are currently less visited relative to the more popular destinations over the period of this strategy, while staying within existing infrastructural and environmental capacities. While the short-term focus is on recovery in all areas, as the recovery progresses, we will set more specific regional targets which will be considered at the mid-term review of this regional tourism development strategy.

### SEASONALITY

Over the medium to long-term, we will look to step change the region's offering and positioning to ensure that it is an attractive year-round destination for sustainable tourism experiences for both domestic and international visitors.



## FUTURE TRENDS

Our strategic approach to recovery and destination development across the Wild Atlantic Way is designed to ensure we align our development focus on global tourism and visitor trends. Continuous monitoring of international tourism and destination trends, visitor sentiment and international consumer

research will provide us with an additional framework to influence future development activity. This will ensure our experiences are 'fit for purpose' and we will build on the emerging opportunities the Wild Atlantic Way is well positioned to capitalise on.



Source: Repucon Consulting





Aerial view of Poll na bPéist, Árainn, County Galway.









## 2. WILD ATLANTIC WAY – VISION FOR THE FUTURE

Donegal

Leitrim

Sligo

Mayo

Galway

Clare

Limerick

Kerry

Cork



## 2.1. OUR VISION FOR THE WILD ATLANTIC WAY

*IT'S 2033 AND THE WILD ATLANTIC WAY IS INTERNATIONALLY RENOWNED FOR ITS SPECTACULAR SEASCAPES, RAW BEAUTY AND WARM HOSPITALITY. IT RANKS AS ONE OF THE TOP FIVE TOURING ROUTES IN THE WORLD WITH ITS RUGGED COASTLINE, UNIQUE IRISH CULTURE, TRADITIONS, AND FRIENDLY PEOPLE AT THE HEART OF ITS OFFERING.*

*VISITORS ARE ENJOYING ALL PARTS OF THE WILD ATLANTIC WAY AND DISPERSAL ALONG THE ROUTE AND INTO TOWNS AND VILLAGES IN THE REGION HAS BECOME MORE EVENLY SPREAD.*

*VISITORS TO THE WILD ATLANTIC WAY TALK OF BEING INSPIRED AND ENRICHED BY MEMORABLE ENGAGEMENT WITH THESE VIBRANT AND CREATIVE COMMUNITIES WHOSE LIVES AND TRADITIONS HAVE BEEN SHAPED BY THE ATLANTIC. THEY TALK OF THE WILDNESS AND BEAUTY OF THE WEST COAST AND THE ABUNDANCE OF WAYS TO ENJOY THE GREAT OUTDOORS BOTH ON LAND AND BY SEA. THEY VALUE THE FREEDOM AND ENERGY IT GIVES THEM TO FEEL FRESH SALTY AIR, EXPLORE SEA CLIFFS AND CAVES, WALK AND CYCLE WONDERFUL COASTAL TRAILS, UNCOVER HIDDEN BEACHES, SAMPLE THE BEST OF SEAFOOD AND IMMERSE THEMSELVES IN LIVING CULTURE.*

## 2.2. OUR STRATEGIC CHALLENGE

*THE STRATEGIC CHALLENGE FOR THE WILD ATLANTIC WAY IS TO GROW ITS APPEAL AS A GLOBALLY ICONIC, "MUST DO" TOURING ROUTE, DRIVING INCREMENTAL BED-NIGHTS AND LONGER STAYS INTO THE REGION WHILE PROTECTING THE CULTURAL AUTHENTICITY AND WILDNESS OF THE WEST COAST.*

*FOR THE NORTHERN HALF OF THE WILD ATLANTIC WAY (FROM CONNEMARA, CO. GALWAY TO CO. DONEGAL INCLUSIVE) THERE IS A NEED TO RAISE ITS PROFILE INTERNATIONALLY AND GROW INCREMENTAL OVERSEAS VISITOR REVENUE.*

*FOR THE SOUTHERN HALF OF THE WILD ATLANTIC WAY (FROM GALWAY CITY, CO. GALWAY TO KINSALE, CO. CORK INCLUSIVE) THE CHALLENGE IS TO SUSTAINABLY INCREASE TOURISM REVENUE, EXTEND THE SEASON AND DISPERSE VISITORS MORE WIDELY WITHIN THE REGION, MINIMISING ANY ADVERSE IMPACTS ON LOCAL COMMUNITIES AND MAXIMISING BENEFITS FOR THEM.*



## 2.3. OUR STRATEGIC OBJECTIVES

# 1

### YEAR-ROUND APPEAL

Grow the year-round appeal of the Wild Atlantic Way domestically and internationally, ensuring we attract and disperse high value visitors into and throughout the region.

# 2

### INTERNATIONAL PROFILE

Raise the international profile of the northern half of the Wild Atlantic Way to increase visitation and revenue.

# 3

### REVENUE, DISPERSION AND EXTENSION

Increase tourism revenue, visitor dispersion and season extension across the southern half of the Wild Atlantic Way.

# 4

### AUTHENTICITY & "WILDNESS"

Protect the cultural authenticity and "wildness" of the Wild Atlantic Way.

# 5

### CAPACITY AND CAPABILITY

Enable and assist the industry to grow its capacity and capability so that it can thrive over the period of this strategy and create sustainable jobs in local communities.

# 6

### INDUSTRY AND STAKEHOLDER

Foster strong coalitions of industry and stakeholders with a common purpose in creating flourishing destinations and thriving communities while also building a sustainable model of destination development across the Wild Atlantic Way.



## 2.4. ACHIEVING OUR VISION FOR THE WILD ATLANTIC WAY

<p><b>1.</b></p> <p><b>STRATEGIC OBJECTIVE:</b></p> <p><i>GROW THE YEAR-ROUND APPEAL OF THE WILD ATLANTIC WAY DOMESTICALLY AND INTERNATIONALLY ENSURING WE ATTRACT AND DISPERSE HIGH VALUE VISITORS INTO AND THROUGHOUT THE REGION.</i></p>	<p>Create a more differentiated approach to marketing the Wild Atlantic Way both domestically and internationally based on visitor segmentation.</p>
	<p>Improve the look and feel of towns and villages along the route to ensure a consistent and quality experience.</p>
	<p>Invest in our Wild Atlantic Way Discovery Points (where appropriate) in order to provide compelling reasons to stay longer at each location.</p>
	<p>Improve the online presence/shop window of Wild Atlantic Way attractions/activities/experiences and online booking capability.</p>
	<p>Address the challenge of public transport within counties where it is weak and collaborate with Local Link and the National Transport Authority (NTA) to address linkages between airports and towns/cities and towns/cities with visitor attractions.</p>
<p><b>2.</b></p> <p><b>STRATEGIC OBJECTIVE:</b></p> <p><i>RAISE THE INTERNATIONAL PROFILE OF THE NORTHERN HALF OF THE WILD ATLANTIC WAY TO INCREASE VISITATION AND REVENUE.</i></p>	<p>Address the need for iconic attractors in the northern half of Wild Atlantic Way.</p>
	<p>Drive incremental tourism revenue through sustained promotion domestically and internationally.</p>
	<p>Create a more sustained partnership and focus with Tourism Northern Ireland, Donegal County Council, Derry-Londonderry City Council and Tourism Ireland to better partner on Wild Atlantic Way and The Causeway Coast for the mutual benefit of the northwest.</p>



# 3.

## STRATEGIC OBJECTIVE:

*INCREASE TOURISM REVENUE, VISITOR DISPERSION AND SEASON EXTENSION ACROSS THE SOUTHERN HALF OF THE WILD ATLANTIC WAY.*

Provide strong visitor management plans for those towns and attractions that are near to, or at, capacity in high season.

Develop new, refreshed offerings in established destinations to maintain competitiveness.

Address the need for strong, supporting, all-weather attractions to retain the visitor and extend the season.

Improve the route infrastructure where congestion issues are becoming evident in the high season, for both the community and the visitor.

Enhance and improve the visitor experience at a range of existing signature and iconic visitor attractions.

# 4.

## STRATEGIC OBJECTIVE:

*PROTECT THE CULTURAL AUTHENTICITY AND “WILDNESS” OF THE WILD ATLANTIC WAY.*

Provide more appropriate visitor facilities and sustainable visitor management plans for the outdoor natural assets in the region.

Conserve, maintain and, where relevant, monitor key elements of biodiversity as part of any development projects to ensure they do not contribute to biodiversity loss or deterioration.

Build and substantiate the reputation of the region as a sustainable tourism destination.

Recognise that sustainable destination development will see a proper balancing of the local community, the environment and the visitor needs, with a focus on protecting the cultural authenticity of the region, particularly in Gaeltacht areas.

Ensure that “wildness” remains at the core of the Wild Atlantic Way across all brand activity.



# 5.

## STRATEGIC OBJECTIVE:

*ENABLE AND ASSIST THE INDUSTRY TO GROW ITS CAPACITY AND CAPABILITY SO THAT IT CAN THRIVE OVER THE PERIOD OF THIS STRATEGY.*

Provide appropriate supports and interventions to enable businesses to thrive.

Dramatically increase the digital and distribution capability of the tourism industry.

Enable all tourism sectors and stakeholders to see economic value in the brand thereby increasing adoption.

# 6.

## STRATEGIC OBJECTIVE:

*FOSTER STRONG COALITIONS OF INDUSTRY AND STAKEHOLDERS WITH A COMMON PURPOSE IN CREATING FLOURISHING DESTINATIONS AND THRIVING COMMUNITIES WHILE ALSO BUILDING A SUSTAINABLE MODEL OF DESTINATION DEVELOPMENT ACROSS THE WILD ATLANTIC WAY.*

Implement Destination and Experience Development Plans to which all stakeholders are aligned relative to the lifecycle of each destination's tourism economy and maturity.

Build strong tourism networks in each destination fostering collaboration and cross promotion.

Involve local communities in tourism development decisions that may affect their place, addressing any concerns they may have.

Support the uptake of sustainability measurement and certification programmes at both enterprise and destination levels.













### 3. WILD ATLANTIC WAY – STRATEGIC FRAMEWORK

Donegal

Leitrim

Sligo

Mayo

Galway

Clare

Limerick

Kerry

Cork



### 3.1. STRATEGIC FRAMEWORK 2023 – 2027

The strategic framework has been developed to achieve the vision for the Wild Atlantic Way while overcoming the strategic challenges we face in the coming years. It begins by outlining our approach to achieving greater levels of sustainability in tourism (**Sustainability Strategy**). It establishes who we are targeting and how we will target them (**Visitor and Brand Strategy**). It identifies the requirement to match the delivery of experiences with what the visitor is looking for and how we will provide them (**Destination Development Strategy & Product Development Strategy**).

The framework outlines how we will enable and assist the industry to grow its capacity and capability and deliver on this strategy (**Industry Development Strategy**). The manner in how we will improve the distribution pipeline for the industry’s saleable experiences (**Distribution and Business Development Strategy**) and what will be done to effectively market the region (**Marketing Strategy**) represents further strands guiding our strategic approach.

We will ensure we build capacity within local communities to ensure they benefit directly from tourism and that tourism works to enhance their lives (**Community Engagement**) while ensuring we protect the environment and avoid any negative impacts on it (**Environmental Strategy**). The strategic initiatives are outlined over the 5-year time frame of the RTDS.

This strategic framework provides the basis for a collective approach to delivering this strategy which a range of stakeholders will collaborate on, ensuring we deliver on the target objectives defined in section 2.3.

TO ENSURE THAT THIS STRATEGY REFLECTS OUR SUSTAINABLE TOURISM GOALS, THE PLAN DELIVERY FRAMEWORK ADOPTS THE VICE MODEL TO GUIDE THE PLAN IMPLEMENTATION.

### SUSTAINABLE TOURISM MODE



SUSTAINABILITY



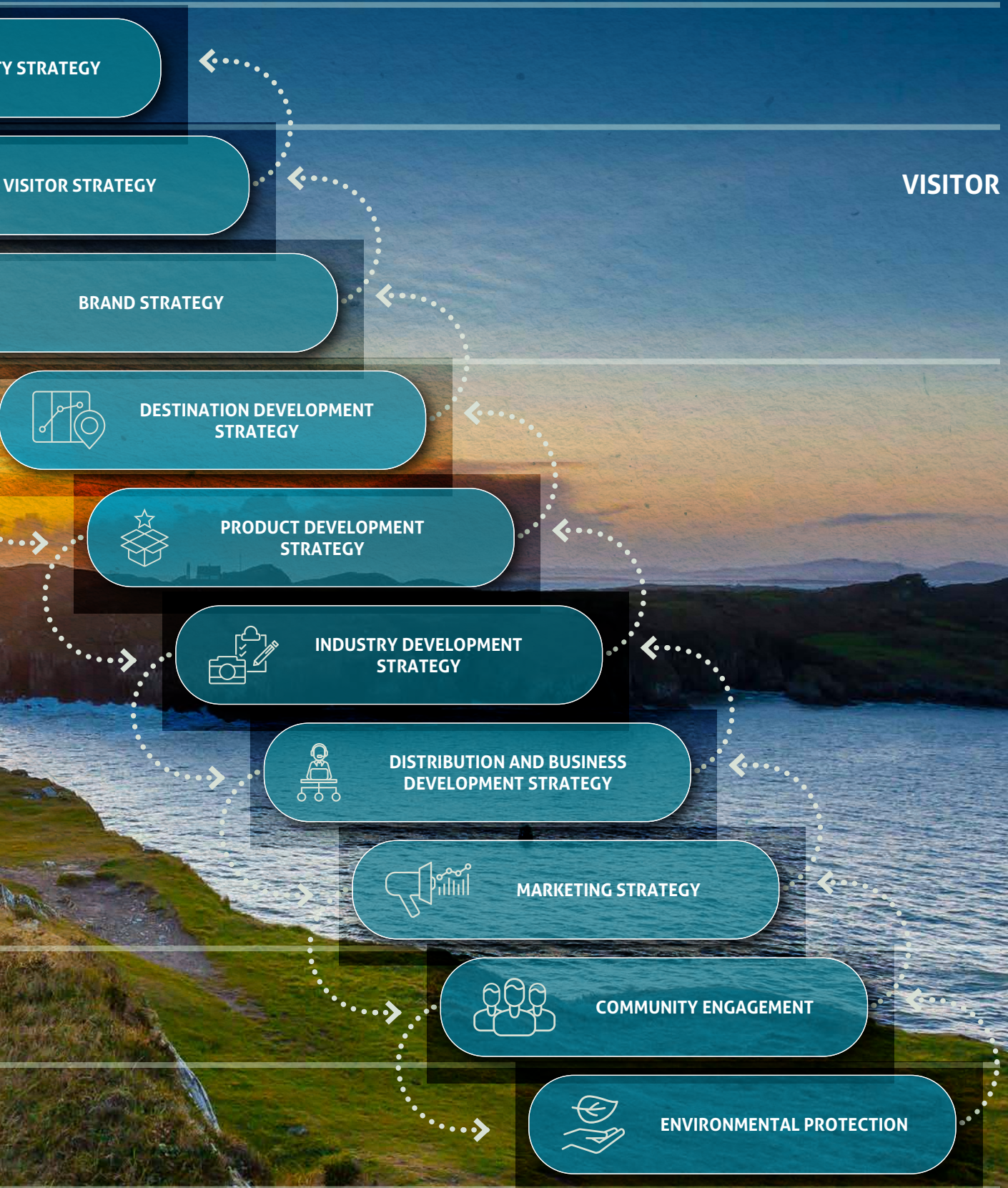
INDUSTRY

COMMUNITY

ENVIRONMENT



L





## 3.2. SUSTAINABILITY, CLIMATE ACTION AND SUSTAINABILITY STRATEGY



Against the backdrop of the **UN Sustainable Development Goals**, Government's commitments under **The Paris Agreement**, and the national **Climate Action Plan 2021**, which includes actions that are relevant to Fáilte Ireland as a key stakeholder, Fáilte Ireland's approach

to tourism development is to ensure that it becomes increasingly sustainable ensuring it can continue to generate incremental revenue to sustain and increase levels of employment in local communities while identifying goals and measuring progress towards meeting of national and sectoral commitments relating to emission targets.

For over ten years, Fáilte Ireland has employed the internationally recognised sustainable tourism model VICE. It focuses on the interaction between Visitors (V), the Industry (I) that serves them, the Community (C) and culture that hosts them and their collective impact on, and response to the Environment (E) to guide the future sustainable development of tourism.

Our approach aligns with the United Nations World Tourism Organisation (UNWTO) definition of sustainable tourism as "tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities". It reflects the organic relationship Fáilte Ireland envisages between our tourism industry partners, the communities where we work and the natural and built environment which makes the Irish tourism product so unique.

Since 2021, Fáilte Ireland's approach has also incorporated a specific suite of actions across all its work based on the recommendations of the Sustainable Tourism Working Group (STWG). The recommendations ([www.gov.ie/en/publication/cOcd3-sustainable-tourism-working-group-report](http://www.gov.ie/en/publication/cOcd3-sustainable-tourism-working-group-report)) in the 2021 report are intended to promote sustainable

tourism practices prior to the development of a new national tourism policy, which mainstreams sustainability. The report stresses the interrelated nature of environmental, social and economic aspects of sustainable tourism development. It identifies the key role of the tourism sector in helping to deliver Ireland's commitments under the **Paris Agreement** on Climate Change, featured in Ireland's **Climate Action and Low Carbon Development Act 2021**.

The actions contained in the Sustainable Tourism Working Group report directly influences all workflows across the organisation. They are captured under each of the strategic pillars of **Fáilte Ireland's Corporate Strategy 2021 - 2023**, in particular under the Driving Climate Action pillar. It includes the following key activities:

- **Driving Change through Knowledge and Metrics** where Fáilte Ireland's Research Team is working to establish a benchmarkable CO<sup>2</sup> value for Irish tourism and a carbon calculator for tourism businesses;
- **Driving Change at the Level of the Business** where Fáilte Ireland's Enterprise Development Team is working to develop an industry-focused toolkit based on best practices to support businesses in understanding and embedding carbon reduction activities;
- **Driving Change at the Level of the Destination** where the Regional Development Team, in conjunction with local authorities and other partners, will work with destinations in their region to benchmark their sustainability performance. They will take steps to progress them on their sustainability journey over the course of each DEDP, including improved access to public transport options. Our Commercial Development Team will work with each regional convention bureau to improve their Global Destination Sustainability index scores, year on year;



- **Promoting Change through our visitors**

where our Marketing and Commercial Development Teams will create new sales and marketing opportunities for sustainable tourism businesses that are providing more sustainable options for our visitors.

Ireland has ratified the United Nations (UN) Convention on Biological Diversity, and all subsequent protocols and is fully committed to halting the loss of biodiversity and the degradation of ecosystem services as set out in the EU Biodiversity Strategy for 2030. Government policy on nature conservation is outlined in the National Biodiversity Action Plan 2017-2021 (NBAP) which includes Ireland's vision for biodiversity: 'That biodiversity and ecosystems in Ireland are conserved and restored, delivering benefits essential for all sectors of society and that Ireland contributes to efforts to halt the loss of biodiversity and the degradation of ecosystems in the EU and globally. In accordance with Objective 1 of the NBAP to 'Mainstream biodiversity into decision-making across all sectors'. Fáilte Ireland, in implementing this strategy, will aim to comply fully with the NBAP with regard to the protection, restoration and enhancement of biodiversity.

Together with the VICE approach to development at the regional level, these actions reflect how Fáilte Ireland will embrace an integrated and collaborative effort across the tourism sector to drive the broad ambition stated in the STWG report, where Ireland will seek to be among the world-leaders in sustainable tourism practice.

Our ambition and practical support to improve the sustainability of tourism will be evident at regional and destination levels. It will include the integration of sustainability goals into DEDPs in collaboration with local stakeholders, to providing practical tools for the tourism sector to measure and reduce its carbon footprint. It will seek to support recruitment and the retention of jobs in the tourism sector. It represents a holistic and practical approach to sustaining and growing tourism's contribution to the economy, local communities and the environment and underpins our efforts in this regional tourism development strategy.

This approach also seeks to go one step further by engaging the visitor fully in the life of the communities, environment and heritage as the core of Ireland's tourism offering, Fáilte Ireland aims

to work with our partners to sustain the tourism sector and support a regenerative approach to tourism development. The Covid-19 global pandemic has accelerated the level of visitor consciousness of their role in sustainability and responsible tourism. Sustainable destination development, especially in rural areas, must align with shifts in visitor expectations in re-defining the value of an experience with new levels of environmental awareness. Accordingly, our approach to sustainable tourism development across the regional brands will become part of the story we tell and will determine how our brand and its associated stories resonate with domestic and international visitors.

In addition to decarbonising the tourism sector, the most important sustainability challenge for the Wild Atlantic Way will be to achieve more balanced regional development of tourism. Future development activity will keep within environmental capacities and ensure tourism activities do not impact negatively on sensitive environments, habitats and species, or on local communities. Given that the tourism offering is largely based on the natural and built heritage, it is crucial that the quality, character and distinctiveness of these assets are protected, and that any development enhances and protects the wildness of the landscape which is at the heart of its offering.

Strong visitor management and the pursuit of value over volume will play a key role in facilitating visitors enjoyment of the spectacular seascapes in a manner that will protect it for future generations. Decarbonising the tourism sector is a key priority of this strategy. The views of local communities should always be listened to, and they must be at the centre of any decision-making affecting the place where they live.



### 3.3. VISITOR STRATEGY

#### RATIONALE

The visitor strategy for the next five years focuses on the specific requirements of the northern and southern halves of the Wild Atlantic Way.

Our visitor strategy will be guided by a new Domestic Motivations Framework and a clear understanding of consumer motivations for travel through continuous visitor research. Similarly, we will be guided by Tourism Ireland's global segmentation model and any further iterations of it over the coming years. This will provide new opportunities for differentiated approaches in the marketing and promotion of the Wild Atlantic Way.

The focus for the northern half of the region is to attract more international visitors from continental Europe. There will also be an increased focus on attracting international golf visitors based on the quality of the golf product along the northern half of the region. Domestically and in the Northern Ireland market, the focus will be placed on targeting greater numbers of higher-spending, unconstrained adults and families. This will be supported by initiatives to encourage increased numbers of short breaks across the shoulder season.

The visitor strategy for the southern half of the Wild Atlantic Way will focus on growing year-round footfall among the domestic market and growing international visitor numbers from North America and mainland Europe. It will diversify into more luxury and "slow tourism" visitors from these core markets with the aim of attracting higher-spending and longer-staying visitors. We will continue to work with the four key convention bureau of Galway, Shannon, Kerry and Cork to attract increased high-yield business visitors across the association conference, incentive and corporate meeting segments.

#### UNDERSTANDING OUR VISITORS

##### INTERNATIONAL VISITORS

##### What motivates visitors from our key international markets?

###### Great Britain

The British market mirrors much of the behaviour of the Irish domestic market in their attraction to bundled holiday type experiences with lots to see and do to (that is different to home). British people want to experience a different culture that they cannot get at home.

Easy walking is their favoured way to sightsee, in both urban and rural settings. Easy activities on, or near water (but not in-water activities, e.g., water sports) perform well, as do coastal walks, boat trips, National Parks, mountain walks near urban centres, etc.

###### Germany

Ireland's dramatic coastal scenery is a Unique Selling Point (USP) for the German market. Germans are more likely to consume the landscape in an active way while soaking up the atmosphere of the authentic local culture is also important.



## France

French holidaymakers enjoy getting off the beaten track, away from perceived visitor hotspots, as a means to explore unspoilt landscapes. French visitors are attracted to authenticity and local experiences

## North America

American holidaymakers like lots of variety in their holiday itinerary and prefer “bite-sized” experiences so they can explore a wide range of experiences. Iconic historic attractions differentiate Ireland and are an important driver of travel for the North American market. Activity is generally of an easy nature as they explore and engage with landscape and historical sites.

**38%**

OVERSEAS TOURISTS AS A PERCENTAGE OF TOTAL OVERSEAS TOURISTS TO WILD ATLANTIC WAY

**70%**

PERCENTAGE OF VISITORS WHOSE MAIN PURPOSE FOR VISIT WAS A HOLIDAY

**59%**

PERCENTAGE OF NIGHTS SPENT BY OVERSEAS HOLIDAYMAKERS IN PAID SERVICED ACCOMMODATION IN WILD ATLANTIC WAY

**6.9**

AVERAGE NUMBER OF OVERSEAS NIGHTS SPENT IN WILD ATLANTIC WAY

**59%**

PERCENTAGE OF OVERSEAS HOLIDAYMAKERS TO WILD ATLANTIC WAY VISITING BETWEEN JUNE AND SEPTEMBER

**€551**

AVERAGE SPEND BY OVERSEAS TOURIST TO WILD ATLANTIC WAY



## DOMESTIC VISITORS

As the Wild Atlantic Way offers many different experiences and is an established brand/geographical region, visitor’s expectations reflect this with 99% having their expectations met or exceeded.

### Domestic Visitor Motivations

While the Covid-19 pandemic has negatively impacted on domestic travel, the relativities of profile and behaviour from 2019 and the last two years remain the same. The region has a penetration of 52% and high intent of 66% (intent to travel to the Wild Atlantic Way). Of those who had visited the region, 20% were first-time visitors to one of the counties with 77% being repeat visitors, the majority of whom stayed in the same location as on their previous trip.

Fáilte Ireland’s new motivations segmentation for the domestic market has unlocked insights that have allowed the region to identify priority segments for targeting and development. Research has shown that, of the drivers for taking a trip, motivation is the most important reason (significantly so, at more than double the next driver) for trip behaviour. After motivation, in rank order, what visitors wanted to do, when they want to take a trip, and lastly, who with (and other demographics), including travel party, are the balance of the drivers of taking a trip.

### The definitions of each of the motivations are as follows:

- **Social Energy:** to enjoy the atmosphere, vibrancy and energy of a place.
- **Adventure:** to push myself and do things out of my comfort zone, mainly in the outdoors.
- **Exploration:** to explore the new and unfamiliar in an area, including culture.
- **Time Out:** to escape my everyday life and de-stress.
- **Reconnection:** to relax and do very little, mainly with person or friends closest to me.
- **Bonding:** to nurture relationships with my family and those closest to me.
- **Celebration:** to celebrate a special occasion.



Source: Fáilte Ireland.



The Wild Atlantic Way mirrors the national profile for domestic travel. It plays to all life stages and a number of consumer motivations. The primary motivations for visiting the Wild Atlantic Way are Exploration and Bonding, with Social Energy and Reconnection also being important. Given the nature of the route and what is on offer on the Wild Atlantic Way, Adventure is an opportunity motivation. The region under-indexes on Celebration.

Ease of access to the region is not a barrier to travel. Rather, it has driven the pull of visiting a well-known region that is on the list of places to where consumers want to travel. Additional reasons for traveling to the Wild Atlantic Way include to experience local culture and local food and drink. At a purely functional level, an additional number of factors were important in choosing to visit the region. Having the right type of accommodation, being seen as safe and secure and offering pet-friendly facilities all over-index. Hotels remain the preferred choice of accommodation, followed by self-catering.

Apart from touring by car, and compared with other regions, visitors to Wild Atlantic Way are more likely to engage in hiking and various water activities (boating, sea swimming, etc.). Walking is an important part of visitation, but it is on par with what visitors would usually do when on a trip.





## **STRATEGIC FOCUS FOR OUR VISITOR STRATEGY –** *ADDRESSING OUR STRATEGIC OBJECTIVES*

### **STRATEGIC OBJECTIVE 1: GROW THE YEAR-ROUND APPEAL OF THE WILD ATLANTIC WAY DOMESTICALLY AND INTERNATIONALLY ENSURING WE ATTRACT AND DISPERSE HIGH VALUE VISITORS INTO AND THROUGHOUT THE REGION.**

#### **STRATEGIC INITIATIVES.**

- 1.** Deliver on the new domestic and international segmentation models which will highlight core opportunities for the region by understanding consumer motivations for travel.
- 2.** Continue to attract best-prospect consumers to fill mid-week and weekend business across the full calendar year.
- 3.** Target and attract the adventure visitor and slow tourism visitor on a year-round basis.

### **STRATEGIC OBJECTIVE 2: RAISE THE INTERNATIONAL PROFILE OF THE NORTHERN HALF OF THE WILD ATLANTIC WAY TO INCREASE VISITATION AND REVENUE.**

#### **STRATEGIC INITIATIVES.**

- 1.** Attract more international visitors to the northern half of Wild Atlantic Way particularly from mainland Europe from where there is direct air access.
- 2.** Attract more international golf visitors particularly to the northern half of Wild Atlantic Way.
- 3.** Attract a higher-spending visitor from Northern Ireland.

### **STRATEGIC OBJECTIVE 3: INCREASE TOURISM REVENUE, VISITOR DISPERSION AND SEASON EXTENSION ACROSS THE SOUTHERN HALF OF THE WILD ATLANTIC WAY.**

#### **STRATEGIC INITIATIVES.**

- 1.** Attract more luxury visitors from core markets to the southern half of Wild Atlantic Way with the aim of attracting higher-spending and longer-staying visitors to the region.
- 2.** Attract more slow tourism visitors e.g., walkers.
- 3.** Continue to work with the four key convention bureau of Galway, Shannon, Kerry and Cork to attract increased high yield business visitor across the association conference, incentive and corporate meeting segments to the west coast.



## 3.4. BRAND STRATEGY

### RATIONALE

The strength of the Wild Atlantic Way brand essence (wildness) lies in its singularity, simplicity and clarity. It is about championing the personality of the Wild Atlantic Way translating its essence into a coherent and recognisable visual language that will promote it as a whole. The brand makes it distinctive, memorable, and different from other destinations in the eyes of the potential visitor through the promise of a unique travel experience.

Over the course of this regional tourism development strategy, Fáilte Ireland will work with its partners and a wide range of tourism businesses to encourage a high level of brand adoption. This will ensure the brand promise is delivered to a high standard across all touchpoints of the visitor experience, and that industry partners and communities can leverage it for the benefit of their businesses and destination.

### STRATEGIC FOCUS FOR BRAND STRATEGY – ADDRESSING OUR STRATEGIC OBJECTIVES

#### STRATEGIC OBJECTIVE 1: GROW THE YEAR-ROUND APPEAL OF THE WILD ATLANTIC WAY DOMESTICALLY AND INTERNATIONALLY ENSURING WE ATTRACT AND DISPERSE HIGH-VALUE VISITORS INTO AND THROUGHOUT THE REGION.

##### STRATEGIC INITIATIVES.

1. Partner with industry to maintain the distinctiveness of the Wild Atlantic Way voice, its look and feel, and, at the same time, give industry partners the power to help build on the brand with the richness of their own stories.
2. Ensure brand alignment between all stakeholders and industry to ensure that messaging around the brand is consistent and in accordance with the brand toolkit.

#### STRATEGIC OBJECTIVE 4: PROTECT THE CULTURAL AUTHENTICITY AND “WILDNESS” OF THE WILD ATLANTIC WAY.

##### STRATEGIC INITIATIVES.

1. Deliver a series of brand optimisation workshops for Wild Atlantic Way to maintain momentum of brand success and give visitors a sense of place.
2. Ensure that the brand proposition informs further tourism capital development in the region.
3. Bring the personality of the Wild Atlantic Way to life by profiling its people and communities and share with visitors the authentic culture and traditions of the west coast which have been shaped by the Atlantic.
4. Assess the benefits of reintroducing a Wild Atlantic Way Brand Ambassador Programme.



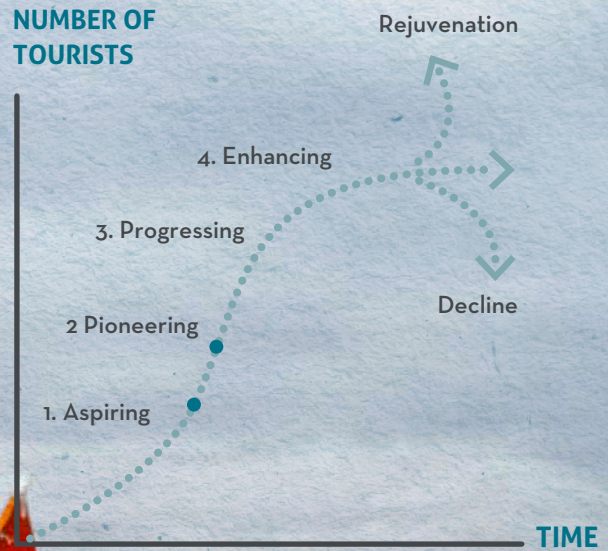
### 3.5. DESTINATION DEVELOPMENT STRATEGY

#### RATIONALE

Developing distinctive destinations requires a multi-layered approach reflecting the range of factors that influence the visitor experience. Our approach to sustainable destination development recognises the collective inputs of all key stakeholders aligned to a shared vision to grow the competitiveness of all destinations along the Wild Atlantic Way.

Our destination development framework recognises the differences that exist in destination maturity across the region. This requires a dedicated approach for each destination based on their maturity levels. Four levels of destination maturity have been identified within our framework. They start with **Aspiring** destinations representing areas with low tourism development experience. The stages of destination maturity grow from this **Aspiring** level to **Pioneering** before developing into more mature tourism destinations defined as **Progressing** and **Enhancing**.

#### Destination Maturity Model



Adapted from Butler, (1980), Tourism Area Life Cycle.



Each maturity level is defined through a set of assessment criteria focused on creating distinctive destinations (see Appendices). These include factors such as current levels of recognition within the overseas and domestic markets, density and quality of tourism products and accommodation. Additional considerations include the depth of services (day and evening time) available for visitors in the primary and secondary hubs in the destination and the strength of local tourism industry networks.

The four destination maturity categories each establish a number of key objectives to be achieved in the course of this strategy.

In destinations possessing the characteristics of a very mature area (i.e., Enhancing), the core objectives will include visitor experience innovation and visitor dispersal. Areas categorised as Aspiring or Pioneering destinations with lower levels of tourism maturity will focus on development activity

such as product development, improving visitor infrastructure and building effective local tourism networks.

The northern half of Wild Atlantic Way is categorised into Aspiring or Pioneering categories (destinations with low profile and destination recognition or good domestic market recognition).

The southern half of Wild Atlantic Way falls broadly into either the Progressing or Enhancing categories (established destinations with good domestic market recognition or a high international recognition factor).

These destination maturity classifications provide us with the development context for this regional tourism development strategy over the next five years. Sustainable destination development will be achieved through a blend of activity guided largely by DEDPs for all areas across the Wild Atlantic Way.



Source: Fáilte Ireland & Repucon Consulting.



### 3.5.1. DESTINATION & EXPERIENCE DEVELOPMENT PLANS (DEDPS)

Fáilte Ireland has been developing DEDPs in a collaborative way with local stakeholders for a number of years. These plans are the detailed action plans through which the strategic objectives in this regional tourism development strategy will be implemented.

They set out the challenges and opportunities for tourism in a destination and present an action plan for the sustainable development of tourism over a 5-year period. All these plans are organised around the VICE model and will be subject to environmental assessment as relevant.

The actions and interventions that are set out in each destination plan are informed by the life stage or maturity level of that particular destination.

Destinations that are at an early stage of development require a different set of interventions and supports to those that are more mature and established.

In the next five years, Fáilte Ireland will have developed 16 DEDPs in the Wild Atlantic Way region. These are outlined below. Projects in bold are either in progress or at the plan implementation stage.

<b>1</b>	<b>Inishowen Peninsula</b>	<b>9</b>	<b>Conamara &amp; na hOileáin</b>
<b>2</b>	West Donegal & the Islands	<b>10</b>	<b>Burren &amp; Cliffs of Moher</b>
<b>3</b>	South Donegal	<b>11</b>	<b>Limerick Gateway City</b>
<b>4</b>	<b>Sligo</b>	<b>12</b>	<b>Cliff Coast (North Kerry &amp; West Clare)</b>
<b>5</b>	<b>North Mayo/Erris</b>	<b>13</b>	<b>Leithinis Chorca Dhuibhne</b>
<b>6</b>	<b>Clew Bay</b>	<b>14</b>	<b>Killarney</b>
<b>7</b>	East Mayo	<b>15</b>	<b>Skelligs Coast</b>
<b>8</b>	<b>Galway City</b>	<b>16</b>	<b>West Cork &amp; Kenmare</b>



**STRATEGIC INITIATIVE – REGIONAL.**

1. In partnership with local stakeholders and industry, we will have a total of **16 DEDPs** developed to ensure all destinations on the Wild Atlantic Way realise their tourism potential and the regional tourism development strategy is delivered. These plans will identify challenges and opportunities in an area; and agree, prioritise, and implement a suite of actions which will deliver the greatest tourism benefit to that area.

**STRATEGIC INITIATIVE – NORTHERN HALF OF THE WILD ATLANTIC WAY.**

1. Focus on **significantly improving the tourism value of towns** in the northern part of Wild Atlantic Way to act as strong motivators for travel for target market segments.
2. **Ensure the investment** from the Platforms for Growth Strategy acts as a catalyst for the transformation of these destinations into **iconic attractors** for the whole region.
3. Collaborate with tourism agencies in Northern Ireland to develop and cross-promote mutually beneficial **linkages between the Causeway Coast and the Wild Atlantic Way**.

**STRATEGIC INITIATIVE – SOUTHERN HALF OF THE WILD ATLANTIC WAY.**

1. **Maintain the competitiveness and attractiveness of mature destinations** (e.g., Killarney, Galway City) by investing in the product offering and creating compelling experiences to ensure visitor dispersal into the wider destination.
2. Develop and deliver **visitor management plans** for products including attractions, towns and villages which are close to, or at capacity in peak season (e.g., Cliffs of Moher, Ring of Kerry, Leithinis Chorca Dhuibhne, Doolin and Kinsale).



### 3.5.2. DEVELOPING VIBRANT TOWNS & VILLAGES

#### RATIONALE

A tourism destination town is a town where a visitor can spend an overnight and which has a cluster of products, services, activities and experiences on offer. Those towns that provide a wide variety of products, services and experiences have the opportunity to increase visitor dwell time and expenditure in local businesses and communities. A town that hopes to attract overnight visitors has to

deliver sufficient levels of engagement to maximise the daytime and night-time economy opportunity. For a visitor to consider a town as a destination where they would stay at least one night, it must broadly have at least one attractor/asset that can drive demand, a variety of things to do and see and a variety of places to sleep and eat.

#### STRATEGIC INITIATIVES.

1. Create a flow of new and enhanced saleable experiences ready for market so that destinations have a rounded day and night-time offering.
2. In partnership with local authorities, leverage all funding to deliver the best tourism outcomes possible for towns and villages in the Wild Atlantic Way region (funding includes Urban Regeneration and Development Fund (URDF)/Rural Regeneration and Development Fund (RRDF), Fáilte Ireland Destination Town funding, Fáilte Ireland Outdoor Animation and Outdoor Dining funding).

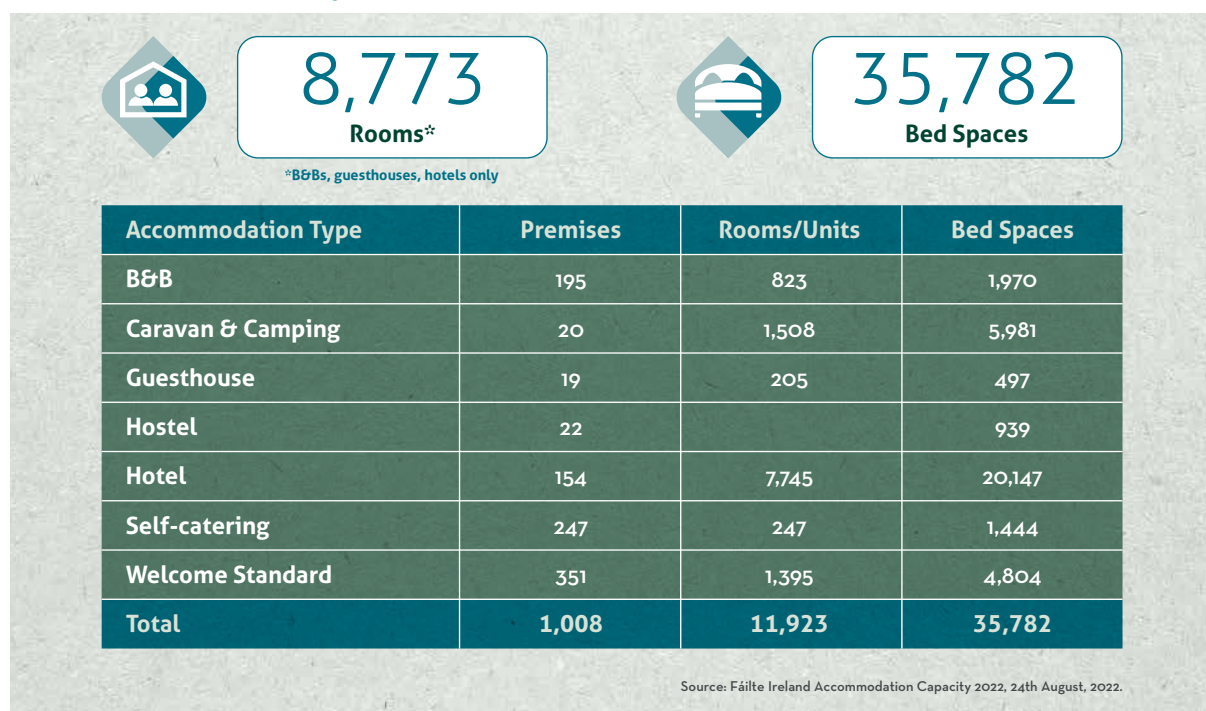


### 3.5.3. ACCOMMODATION STRATEGY

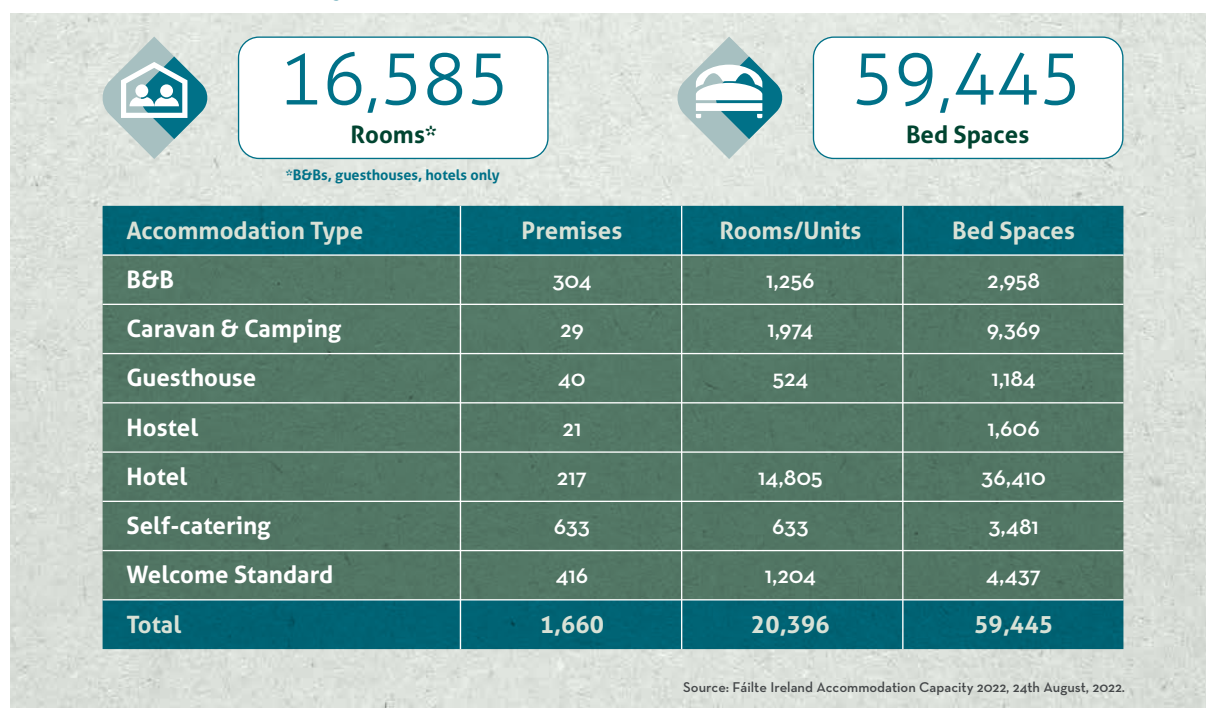
The Wild Atlantic Way region accounts for 2,668 registered and approved accommodation properties (52% of national), comprising 32,319 rooms/units

(39% of national) and 95,227 bed spaces (41% of national). Source: Fáilte Ireland National Quality Assurance Framework.

#### Northern Wild Atlantic Way



#### Southern Wild Atlantic Way





While the recovery period following the Covid-19 pandemic is expected to last until 2025 or 2026 (in terms of getting back to 2019 levels), there is expected growth in the accommodation sector along the Wild Atlantic Way. This is particularly in the areas of diversification of accommodation types, e.g., in-nature and glamping accommodation.

Housing for All is the government’s housing plan for Ireland to 2030 [www.gov.ie/housingforall](http://www.gov.ie/housingforall). The new housing plan sets out that government will bring forward legislation on the revised regulatory controls requiring the registration of all tourist short-term, and holiday lets accommodation with Fáilte Ireland under a Short Term Tourist Letting (STTL) register from 2023.

At present Fáilte Ireland statutory functions relate to the regulation of those types of tourist accommodation that are prescribed terms under the Tourist Traffic Acts (TTAs) such as “hotel” and “guesthouse”. The new legislation will allow Fáilte Ireland to deal with all types of short-term tourist

lettings irrespective of the description. This would cover accommodation such as individual rental units, accommodation units within residential properties, apart-hotels, glamping sites and other forms of alternative accommodation.

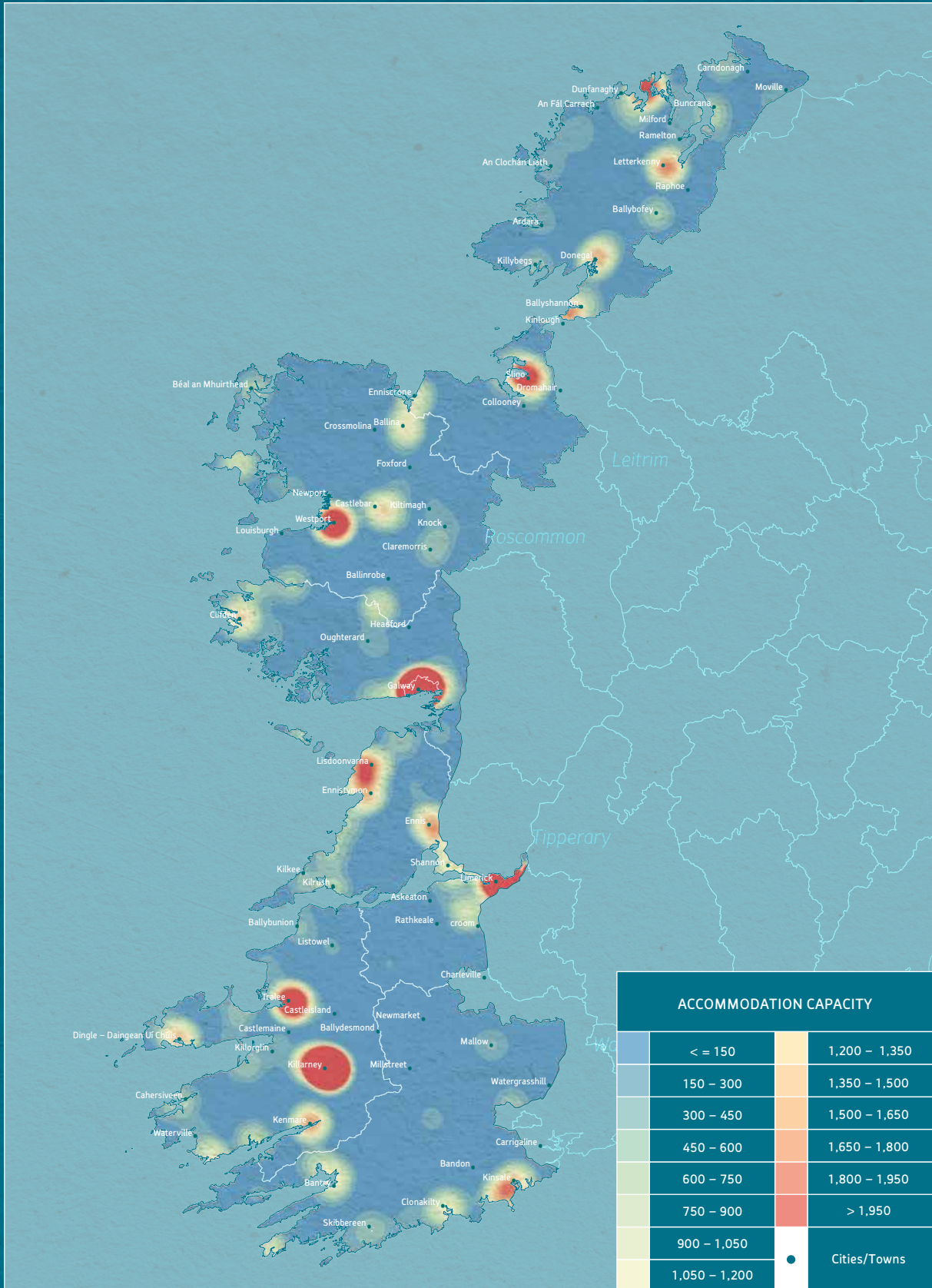
The Temporary Protection Directive (2001/55 EC) was activated by EU Council Decision EU 2022/382 of 4th March 2022, to provide immediate protection in EU countries for people displaced by the Russian invasion of Ukraine. The Government of Ireland as a member of the European Union has committed to playing its part and has contracted tourism accommodation to provide emergency accommodation. In addition to this, applications for International Asylum have increased placing further pressure on tourism accommodation availability. While the objective is to place people in more suitable long-term accommodation, this will take time to stabilise over the lifetime of this regional tourism development strategy, given the shortage of housing availability and ongoing population growth.

## STRATEGIC INITIATIVES.

1. Over the period of this strategy, we will conduct destination-based accommodation audits to scope out what additional accommodation (quantity and type) is required in specific destinations. These will inform the improvement and expansion of the accommodation sector in the region in line with visitor strategy and its related capacity requirements, and in accordance with planning and environmental regulations.
2. Encourage the development of quality and diverse accommodation offerings in pockets along the Wild Atlantic Way, using the evidence of destination-based accommodation audits where a clear need has been identified. This will facilitate more balanced regional development along the Wild Atlantic Way (e.g., all offshore islands, North Mayo, West Donegal, Sligo, West Cork).
3. Registration of all unregistered and unapproved accommodation in the region (subject to Short-Term Letting Legislation).
4. Continue accommodation roadshows to recruit additional accommodation into the National Quality Assurance Framework (NQAF).
5. Engage with local authorities and the County and City Management Association (CCMA) to support the growth of facilities for camper vans and “Aires” in suitable and sustainable locations.
6. Over the course of this strategy, we will increase online visibility for all accommodation through the Digital that Delivers Programme.



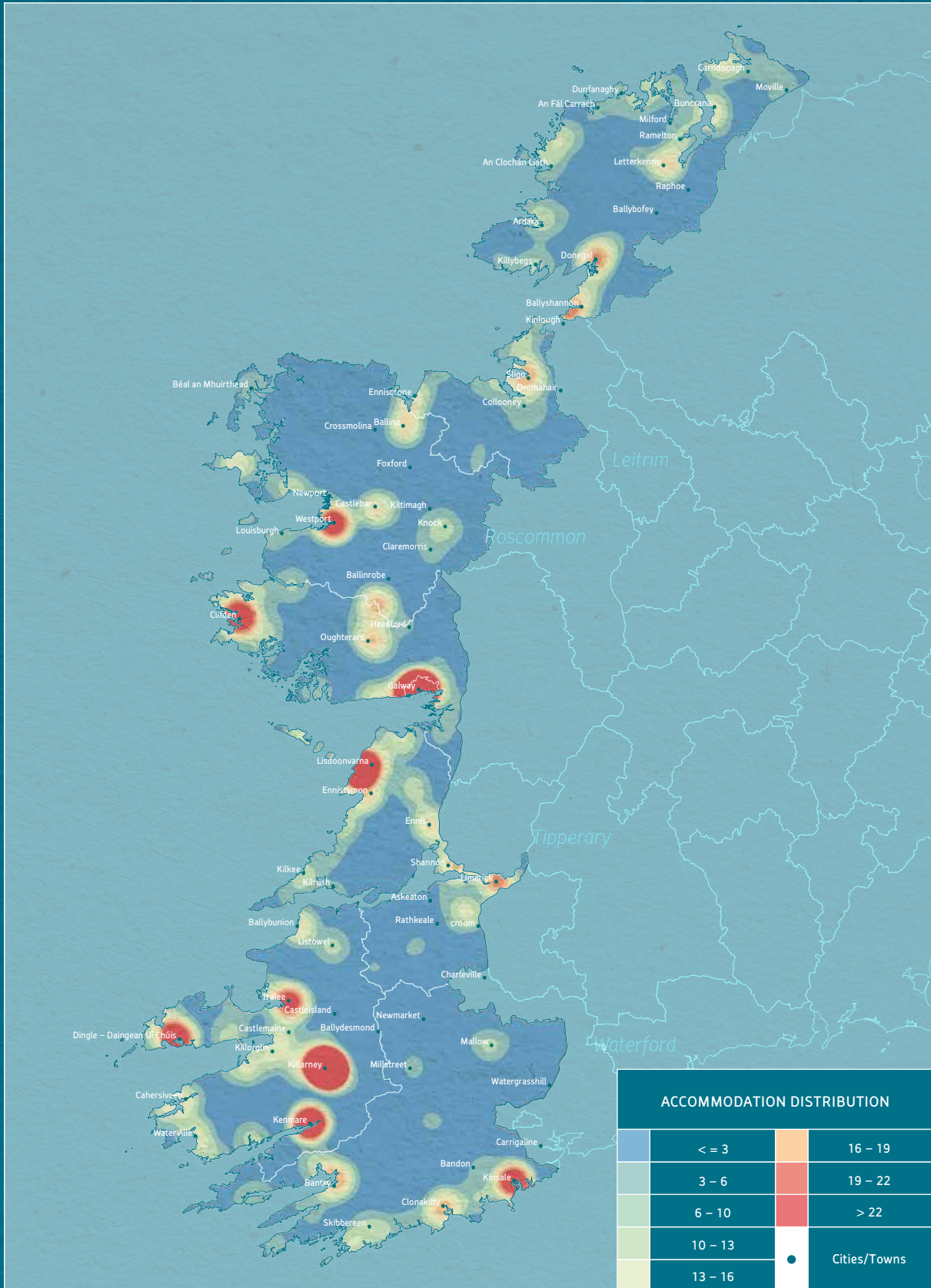
## ACCOMMODATION CAPACITY – WILD ATLANTIC WAY



Source: Mallon Technology.



## ACCOMMODATION DISTRIBUTION – WILD ATLANTIC WAY



Source: Mallon Technology.



### 3.5.4. ACCESSIBILITY FOR ALL

Accessibility is a central element of any responsible and sustainable development and is a critical component of tourism development, enabling all people to participate in and enjoy tourism experiences. Improved accessibility to basic infrastructure and tourism amenities is essential in meeting the needs and requirements of all visitors to the Wild Atlantic Way. This does not only equate to providing access to those with disabilities, but it also addresses the importance of creating universally designed environments to support people with physical needs, the increasing ageing population and those who have difficulty with mobility or access to information.

Implementing the principles of accessible tourism involves a collaborative process. Fáilte Ireland, working in partnership with State agencies, local authorities, NGOs and local stakeholders, will continue to use best practice in implementing the principles of universal design across all projects to ensure that all persons, regardless of their physical or cognitive needs, are able to use and enjoy all available amenities in an equitable and sustainable manner.

#### STRATEGIC INITIATIVES.

AS PROJECTS ARE DEVELOPED ACROSS THE WILD ATLANTIC WAY, FÁILTE IRELAND WILL ASPIRE TO:

1. Develop and create accessible facilities, infrastructure and transport in order to create an environment that is varied, stimulating and easily accessible.
2. Ensure tourism information, communications and all promotional resources used in tourism include clear indications of accessible services and facilities.
3. Liaise with the tourism industry and our stakeholders, who play an important role in reducing potential deficiencies in access, to support training in accessibility awareness and customer care to ensure the development and promotion of tourism for all.
4. Increase the availability of adapted and accessible accommodation and tourism amenities, and ensure booking services and websites are accessible for all.



### 3.5.5. TRANSPORT AND ACCESS

#### Air and Sea Access

Air access to the Wild Atlantic Way is crucial for the recovery and growth of international visitors to the region. We will support the route development ambitions of the regional airports and Tourism Ireland by providing them with the strongest possible destination and product experiences and by working to ensure all industry partners are aware of and are actively promoting routes as part of their international marketing and sales activities. Fáilte Ireland will also collaborate with its airport partners to ensure a warm welcome to overseas visitors arriving in their terminals by ensuring that regional branding and imagery are in situ ensuring a sense of arrival and of place.

#### Public Transport & Electric Vehicle (EV) Charge Points Network

Public transport to the Wild Atlantic Way from hubs such as Dublin City, from Dublin Airport, and from Cork City, is strong with regular bus and train services operated by both the public and private sectors. Public transport within counties however is

weaker with little or no linkages between towns and visitor attractions, or key cities and tourism towns. This is compounded by timetables which are not integrated and can result in it being unviable for the visitor to tour the region by public transport. Fáilte Ireland has completed a number of pilot projects with Local Link at both national and local level to address these issues and will act to further develop this initiative.

There is a role for “Park & Ride” facilities in key tourism hubs along the Wild Atlantic Way in the management of congestion challenges, supporting sustainable development and providing a better visitor experience.

The need for electric charge points has also become evident. There is an opportunity to grow the Wild Atlantic Way’s reputation as a sustainable destination by adequate provision of Electric Vehicle (EV) charging points. In this regard, particular attention should be paid to identifying means of supporting the sector in installing charge points in their car parks, thereby facilitating visitors when they stop for a meal or an overnight stay.

#### STRATEGIC INITIATIVES.

1. Collaborate with Local Link and the National Transport Authority (NTA) in addressing linkages between airports and towns/cities and towns/cities with visitor attractions.
2. Provide visitor numbers and travel patterns to NTA/Local Link at highly touristed attractions to inform new routes and EV charging points.
3. Promote Local Link routes for use by visitors.
4. Create “Park & Ride” facilities in known congestion spots in partnership with relevant stakeholders.
5. Promote locations of EV charging points.
6. In conjunction with the Department of Transport, explore avenues to support the tourism sector in installing EV charging points in their car parks.



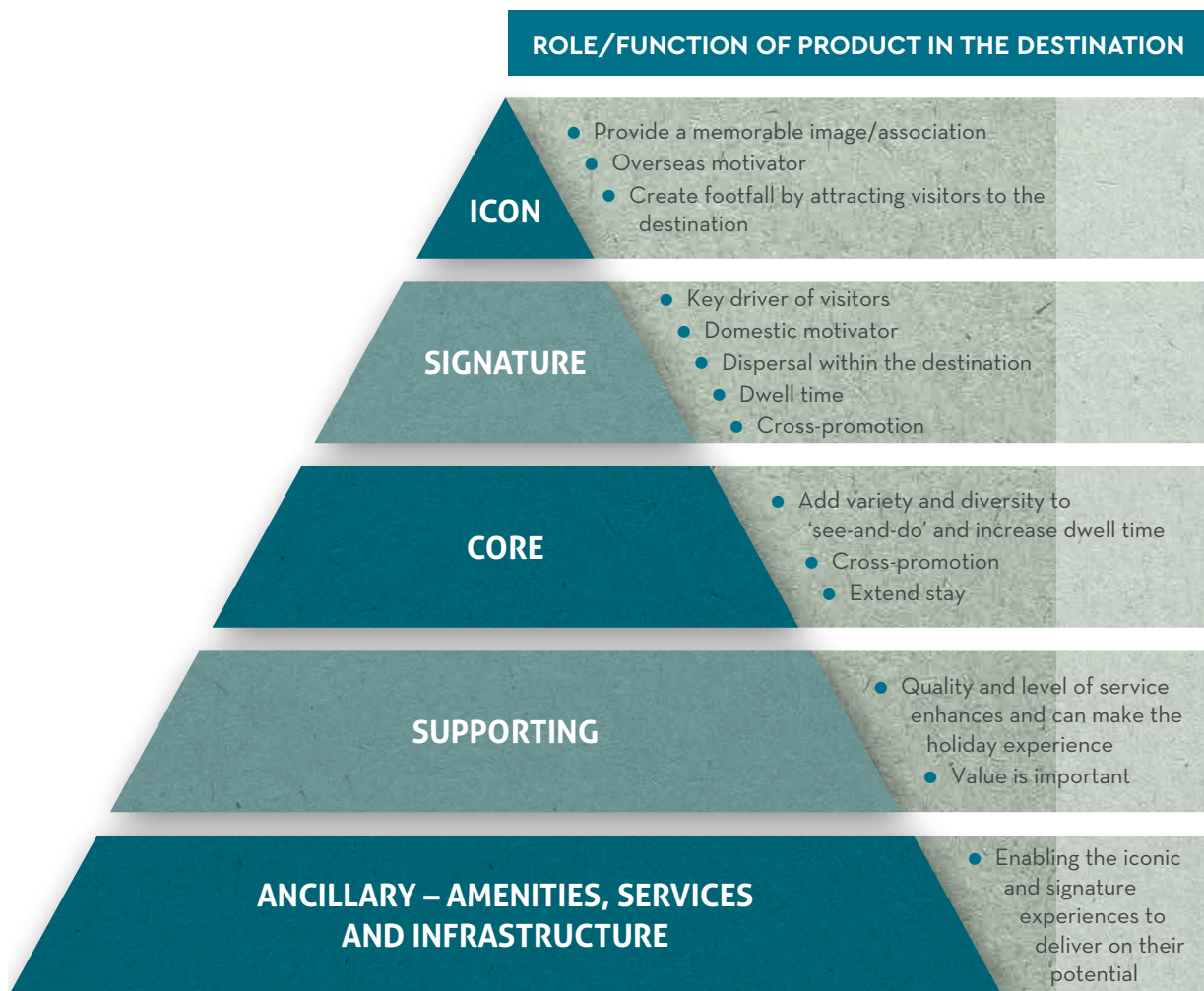
### 3.6. PRODUCT DEVELOPMENT STRATEGY

#### RATIONALE

The approach to tourism product development in this strategy is based on the developmental needs of the region and the maturity-based model of destination development. To facilitate this destination-led approach, a Product Development Framework has been developed. It will categorise the product base within a destination in terms of the function and role it plays in the destination and

how it can contribute to the overall objectives of the destination. A similar approach will be taken in each of the Destination and Experience Development Plans (DEDPs). This approach will ensure that the right product is developed in the right place for the right reasons, informed by the particular needs of the destination.

#### Destination–Led Product Development Framework



Source: Fáilte Ireland.



## **STRATEGIC FOCUS FOR PRODUCT DEVELOPMENT –** *ADDRESSING OUR STRATEGIC OBJECTIVES*

The southern half of the Wild Atlantic Way falls broadly into either the ‘Progressing’ or ‘Enhancing’ destination maturity categories (established destinations with good domestic market recognition or a high international recognition factor).

The northern half of Wild Atlantic Way is categorised in the ‘Aspiring’ or ‘Pioneering’ categories (destinations with low profile and destination recognition or good domestic market recognition).

This results in significant differences in visitor numbers and visitor experience between the north and south of the Wild Atlantic Way with each area possessing different product development challenges.

The following strategic Wild Atlantic Way Regional Tourism Development Strategy objectives will be addressed.

### **Northern Half of Wild Atlantic Way**

The focus will be on raising its profile internationally and developing the tourism infrastructure with new and iconic and signature attractors which will differentiate the region and boost its appeal.

### **Southern Half of Wild Atlantic Way**

The emphasis will be on the creation, enhancement and refreshment of compelling visitor experiences and strong visitor management plans for iconic and signature attractions. It will require refreshed and motivating supporting attractions identified as key to retaining the visitor within the region and encouraging incremental overnights.

**STRATEGIC OBJECTIVE 1: GROW THE YEAR-ROUND APPEAL OF THE WILD ATLANTIC WAY DOMESTICALLY AND INTERNATIONALLY ENSURING WE ATTRACT AND DISPERSE HIGH VALUE VISITORS INTO AND THROUGHOUT THE REGION.**

**STRATEGIC OBJECTIVE 2: RAISE THE INTERNATIONAL PROFILE OF THE NORTHERN HALF OF THE WILD ATLANTIC WAY TO INCREASE VISITATION AND REVENUE.**

**STRATEGIC OBJECTIVE 3: INCREASE TOURISM REVENUE, VISITOR DISPERSION AND SEASON EXTENSION ACROSS THE SOUTHERN HALF OF THE WILD ATLANTIC WAY.**

**STRATEGIC OBJECTIVE 4: PROTECT THE CULTURAL AUTHENTICITY AND “WILDNESS” OF THE WILD ATLANTIC WAY.**

Within the product development strategy, we have defined the key initiatives under four development categories of the Wild Atlantic Way route, the Wild

Atlantic Way region, and the southern and northern halves of the route.



## STRATEGIC PRODUCT DEVELOPMENT INITIATIVES –

### VISITOR ATTRACTIONS AND ACTIVITIES

#### WILD ATLANTIC WAY ROUTE.

1. Improve **road infrastructure** on or near the Wild Atlantic Way driving route and tackle critical congestion issues at key locations where interventions are required to improve the navigation and safety of the Wild Atlantic Way route for visitors and local communities alike.
2. Upgrade and maintain the **signage and Discovery Points** on the Wild Atlantic Way ensuring a quality and consistent experience.
3. Enhance the profile of the **Signature Discovery Points** along the route ensuring there is a consistent visitor experience at each.
4. In partnership with local authorities, deliver key Discovery Point projects at **Bray Head, Cliffs of Moher, Keem Bay** and **Malin Head** with robust stakeholder and community engagement to ensure the sustainable delivery and management of same.
5. **Enhance the sense of arrival and journey** for visitors at the start/end points of the Wild Atlantic Way.

#### WILD ATLANTIC WAY REGION.

1. Specific projects for investment at a destination level, especially the **provision of strong core and supporting products for iconic attractions**, are included in the region's DEDPs.
2. Create and promote **new outdoor experiences** which will enable visitors to actively enjoy the spectacular land and seascapes of the Wild Atlantic Way and build its reputation as an outdoor mecca.
3. Fáilte Ireland has established **strategic partnerships** with State agencies that have a key role to play in tourism – Coillte, NPWS, OPW and the Department of Housing, Údarás na Gaeltachta, Local Government & Heritage, Waterways Ireland. These partnerships are critical to the Wild Atlantic Way region given the range of iconic natural assets and heritage attractions.  
  
We will prioritise projects currently being developed and delivered as part of these strategic partnerships. These include but are not limited to: Coillte – Coolaney Mountain Bike Trails in Co. Sligo, NPWS – delivery of a masterplan for Glenveagh National Park in Co. Donegal, OPW – masterplan for Kinsale OPW heritage sites Co. Cork, Údarás na Gaeltachta – delivery of two new cultural attractions in the Gaeltacht areas of Árainn & Leitir Mealláin, Co. Galway.
4. In partnership with local authorities, deliver a network of **water sports facilities** at key beaches and harbours along the Wild Atlantic Way.
5. Support visitor attractions (including those with significant recent product investment) to refresh and diversify their product offerings, including the provision of both **indoor and outdoor all-weather experiences**.



**WILD ATLANTIC WAY REGION.**

6. Develop a network of **greenways and blueways** to provide new and upgraded trail experiences and support the private sector in the delivery of activity experiences. Develop a framework for safe, on-road, sustainable cycling to support long distance “grey routes” including Euro Velo 1 and in destinations with no greenway offering.
7. Develop **looped drives** along the Wild Atlantic Way route to aid dispersal through the region, working in conjunction with the local authorities.
8. Develop a framework to guide the development of the **Wild Atlantic Way Coastal Path** through the upgrading and enhancement of existing coastal trails, e.g., Cliffs of Moher Coast Path & The Dingle Way, and the identification and development of new coastal trails and linkages.
9. Develop the long distance **Beara Breifne Way** to National Trails Office (NTO) Plus standards and facilitate its activation and animation, fully engaging the businesses along the way.
10. Undertake a review of **marine infrastructure** in order to assess island accessibility and enhance the product offering on offshore Islands with passenger accessibility.
11. Develop world-class experiences in the area of **coastal boat tours** and sustainably realise this opportunity with local communities/providers.
12. Support the development of authentic experiences which make the **cultural uniqueness of the Gaeltacht** more accessible to the visitor.
13. Support the development of **food experiences and food trails** particularly those which can showcase the wealth of artisan and seafood providers on the west coast, and which will build our reputation internationally as a “foodie” destination.



### SOUTHERN HALF OF WILD ATLANTIC WAY.

1. In partnership with Local Authorities, prioritise the delivery of the **Fáilte Ireland investment projects** currently underway e.g., **Galway City Museum, while continuing to develop new and pipeline projects**. Fáilte Ireland will support local authorities to develop appropriate governance and operating models for visitor attractions within their remit.
2. Business Tourism: Develop **a gala dinner investment scheme** to address a product gap in the region for attracting conference and incentive business in areas such as **Killarney, Limerick and Galway**.
3. Increase the number of **new luxury saleable experiences** in order to maintain competitiveness and offer compelling reasons to choose the region for business & incentive events and luxury tourism.
4. Increase the number of **quality indoor or all-weather supporting attractions** which can serve to extend the season and increase dwell time within the region.
5. Enhance and improve the visitor experience at a range of existing signature and iconic visitor attractions, particularly those that are mature and are at risk of decline

### NORTHERN HALF OF WILD ATLANTIC WAY.

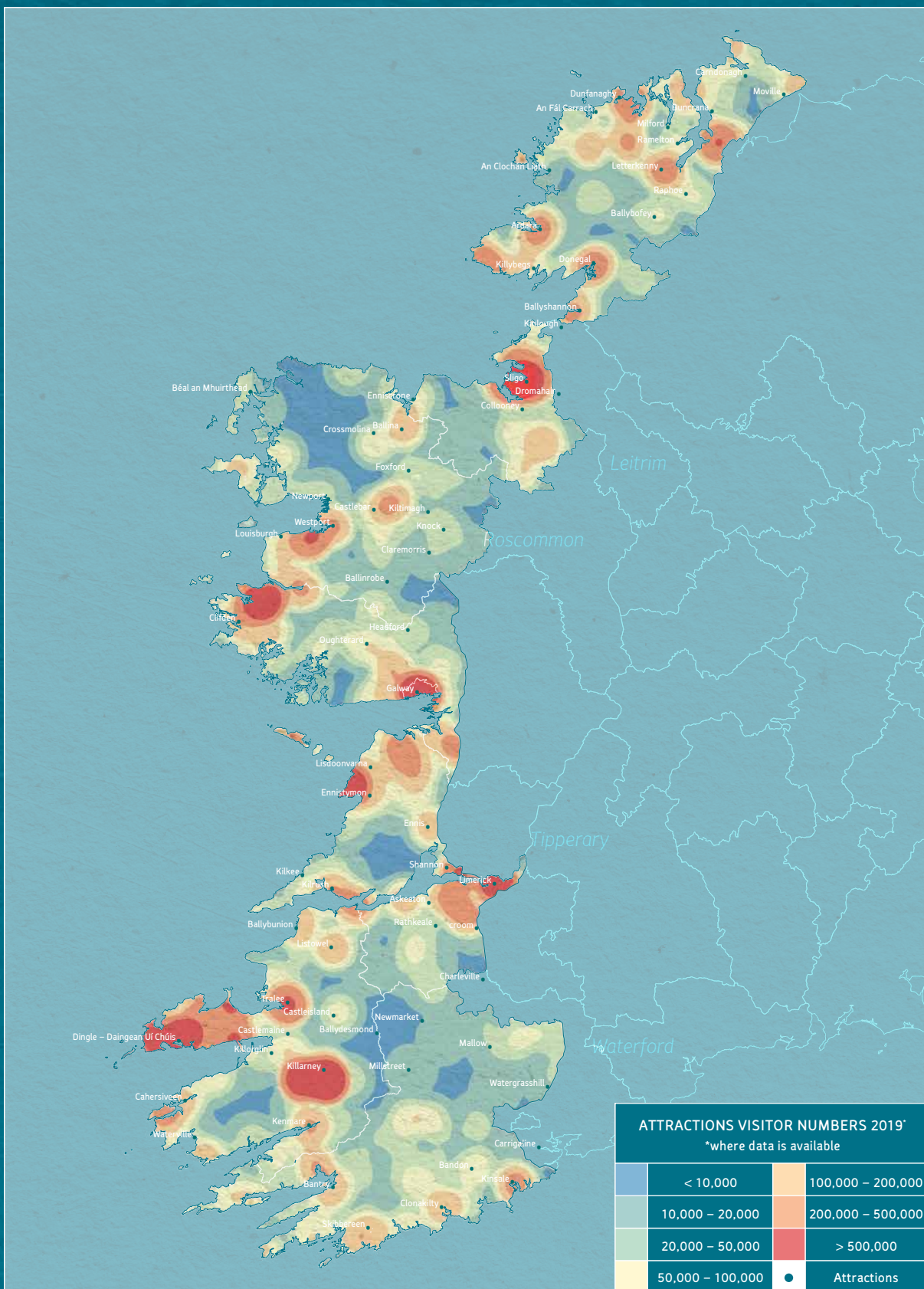
1. Working with a range of stakeholders, **develop and deliver at least two iconic attractors e.g., Fort Dunree and Westport House & Estate** (Funding committed to these two projects under Fáilte Ireland's Platforms for Growth Programme).
2. In partnership with local authorities, prioritise the delivery of the **Fáilte Ireland investment projects** currently underway such as **Queen Maeve Square, Sligo and the National Surf Centre, Strandhill, Co. Sligo while continuing to develop new and pipeline projects**.
3. In collaboration with stakeholders identify **3 - 5 upland locations** (e.g., Croagh Patrick, Co. Mayo and Mount Errigal, Co. Donegal) for inclusion in the extension of the Upland Mountain Access Scheme currently in operation in the MacGillicuddy Reeks.

In respect of all tourism development projects, we will ensure that all potential impacts on biodiversity and ecosystem services will be avoided or minimised. For example, we will ensure that impacts on bats and other wildlife will be avoided or minimised by choosing appropriate light fittings in both urban and rural settings.

Likewise, to ensure that all trail development is undertaken in a sustainable manner, Fáilte Ireland in conjunction with relevant partners will prepare, early in 2023, a guidance document on the protection of the natural heritage in planning, constructing, maintaining and managing recreational trails in Ireland.



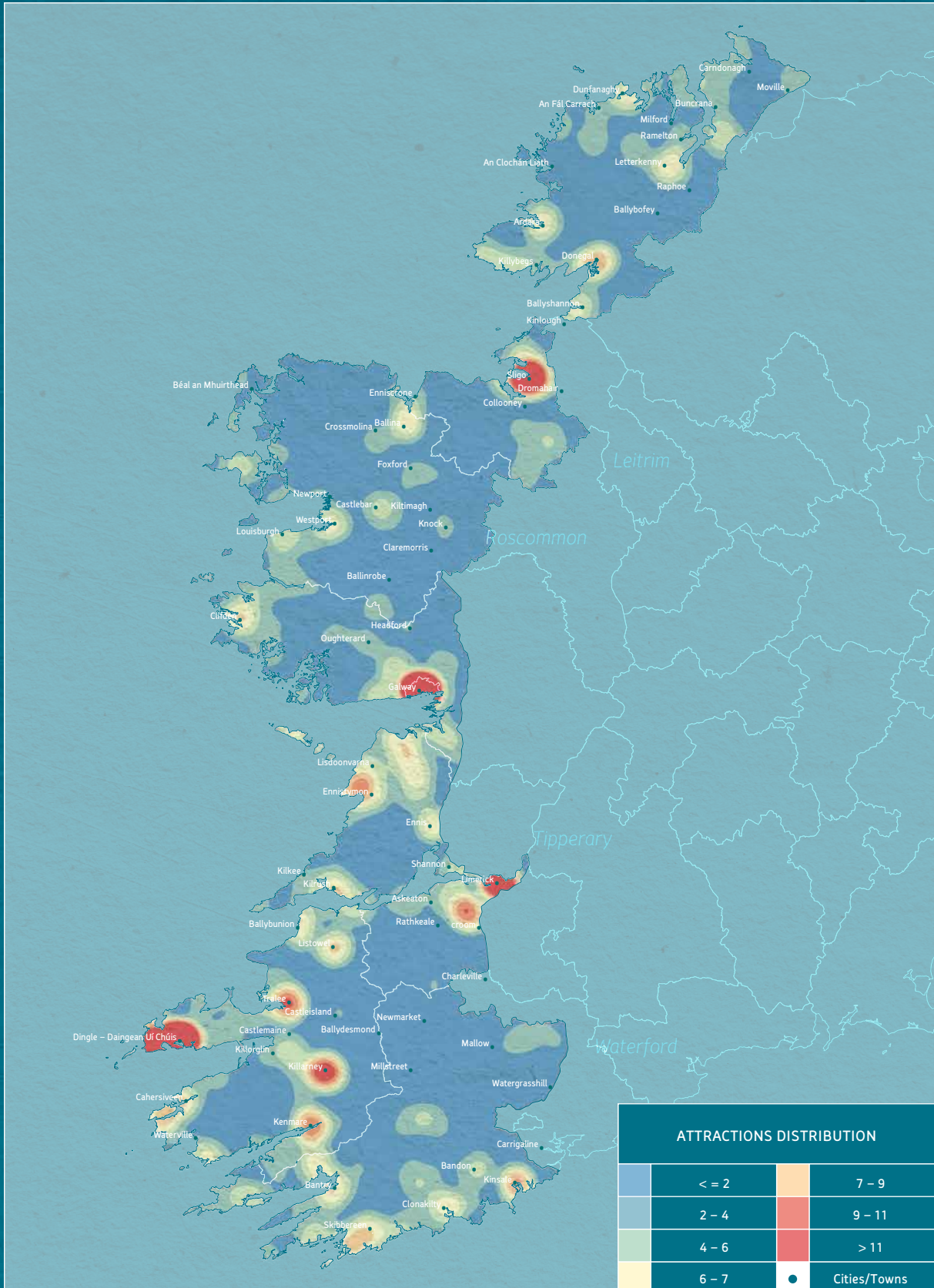
## ATTRACTIONS VISITOR NUMBERS 2019 – WILD ATLANTIC WAY



Source: Mallon Technology.



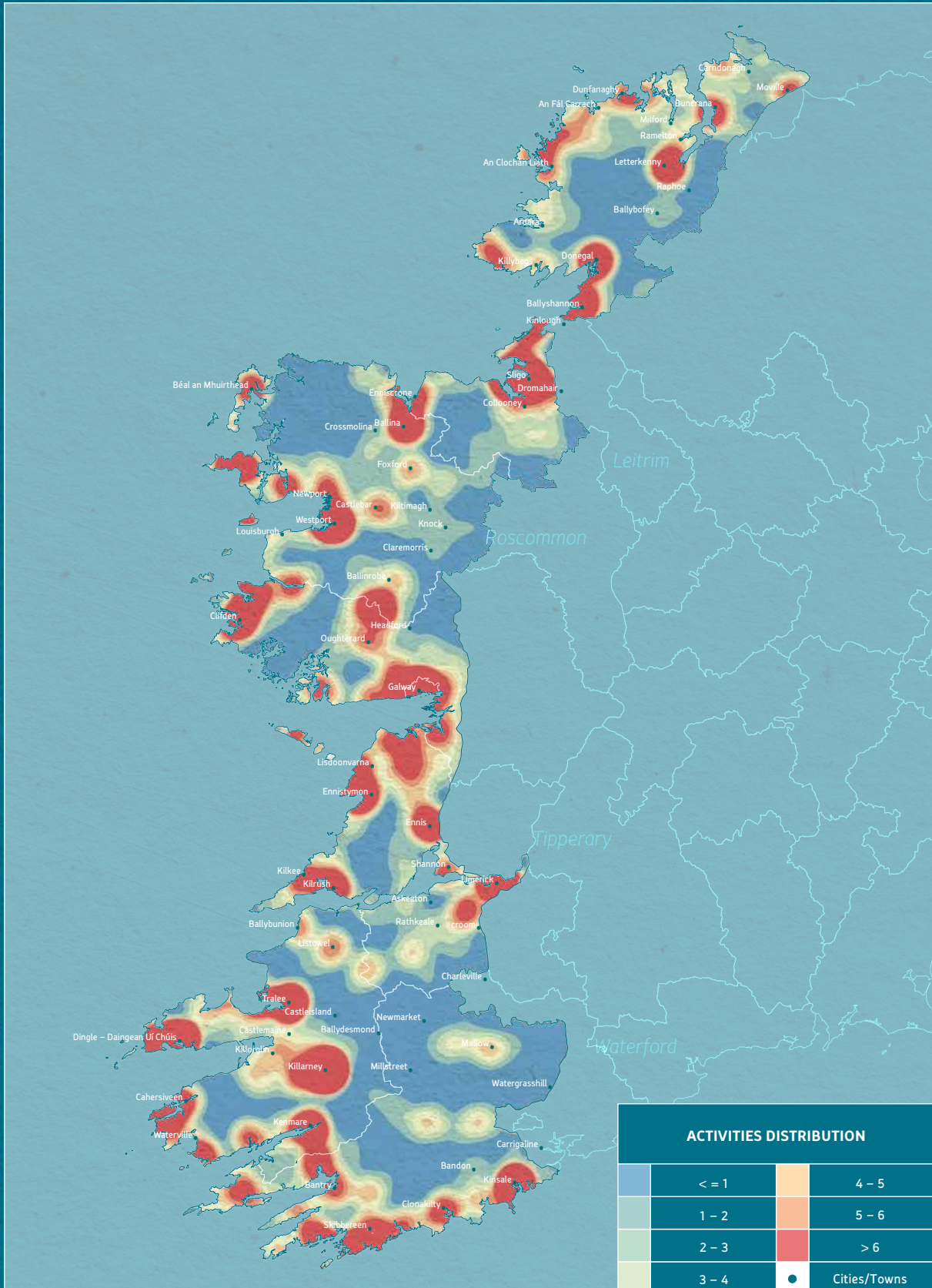
## ATTRACTIONS DISTRIBUTION – WILD ATLANTIC WAY



Source: Mallon Technology.



## ACTIVITIES DISTRIBUTION – WILD ATLANTIC WAY



Source: Mallon Technology.



### 3.6.1. FESTIVALS

#### RATIONALE

Festivals are key motivators for the local, domestic and international consumer. They both increase dwell time and generate local economic impact. We will continue to work with a number of strategic festivals that have Unique Selling Points (USPs) and offerings that are unique to Wild Atlantic Way. We will help them build stronger networks of their own through targeted domestic and international supports.

By raising awareness of these festivals, Wild Atlantic Way will become synonymous with its own unique portfolio of festivals. As part of these partnerships, we will also work with stakeholders who have specific offerings in the area of living culture propositions such as local food, craft, music and dance which are authentic and unique to the region.

#### STRATEGIC FOCUS FOR FESTIVALS – ADDRESSING OUR STRATEGIC OBJECTIVES

#### STRATEGIC OBJECTIVE 1: GROW THE YEAR-ROUND APPEAL OF THE WILD ATLANTIC WAY DOMESTICALLY AND INTERNATIONALLY ENSURING WE ATTRACT AND DISPERSE HIGH VALUE VISITORS INTO AND THROUGHOUT THE REGION.

##### STRATEGIC INITIATIVES.

1. Explore and test the feasibility of establishing a series of annual or bi-annual outdoor activity events which will attract domestic and international visitors to the area in the shoulder season, increase bed nights, benefit the local economy and raise awareness of the area internationally (e.g., walking festivals along the Wild Atlantic Way, surfing festivals north of Galway). A pilot project will take place in 2023.
2. Continue to support and develop signature festivals with the potential to attract international visitors to the Wild Atlantic Way and which will support the evening economy in destination towns.
3. In less mature destinations, create platforms upon which smaller regional festivals can be grouped together in order to promote a positive destination image and drive a longer season.
4. Continue to work with the Department of Foreign Affairs and the local authorities on the Global Irish Festival Series, signature festivals and events targeting the diaspora market, e.g. Kerry, Limerick, Mayo, and Donegal.
5. Continue to develop the regional St Patrick's Festivals in Sligo, Galway, Limerick and Killarney.

Delivery of this strategy is dependent on the availability of the capital funding from a range of sources.



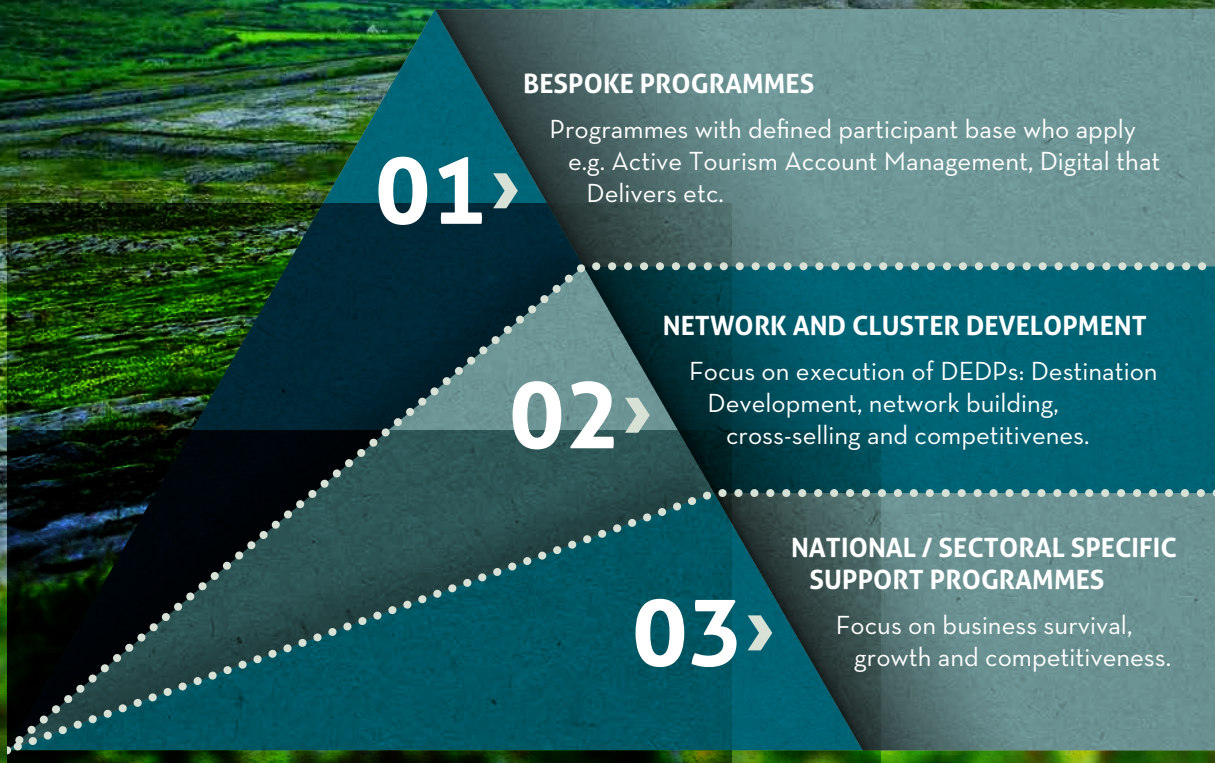
## 3.7. INDUSTRY DEVELOPMENT STRATEGY

### RATIONALE

Destinations across the Wild Atlantic Way are at different stages of development and destination maturity. The future focus on network development will be appropriate to each area's respective level of maturity, ensuring that the right interventions and supports are delivered at the right time.

We will work with our tourism industry to ensure they are supported to grow and maintain competitiveness through collaboration at a destination level and to ensure that they are primed

to deliver on the agreed outputs of their destination plan resulting in a step change for the destination. No tourism business in the region will be without access to relevant capability building supports. These supports will be flexed over the course of the economic cycle, progressing from measures focused on business survival, to recovery and from there onto supporting sustainable growth strategies at the level of the destination and the business.



Source: Fáilte Ireland.







**STRATEGIC FOCUS FOR INDUSTRY DEVELOPMENT –**  
*ADDRESSING OUR STRATEGIC OBJECTIVES*

**STRATEGIC OBJECTIVE 5: ENABLE AND ASSIST THE INDUSTRY TO GROW ITS CAPACITY AND CAPABILITY SO THAT IT CAN THRIVE OVER THE PERIOD OF THIS STRATEGY.**

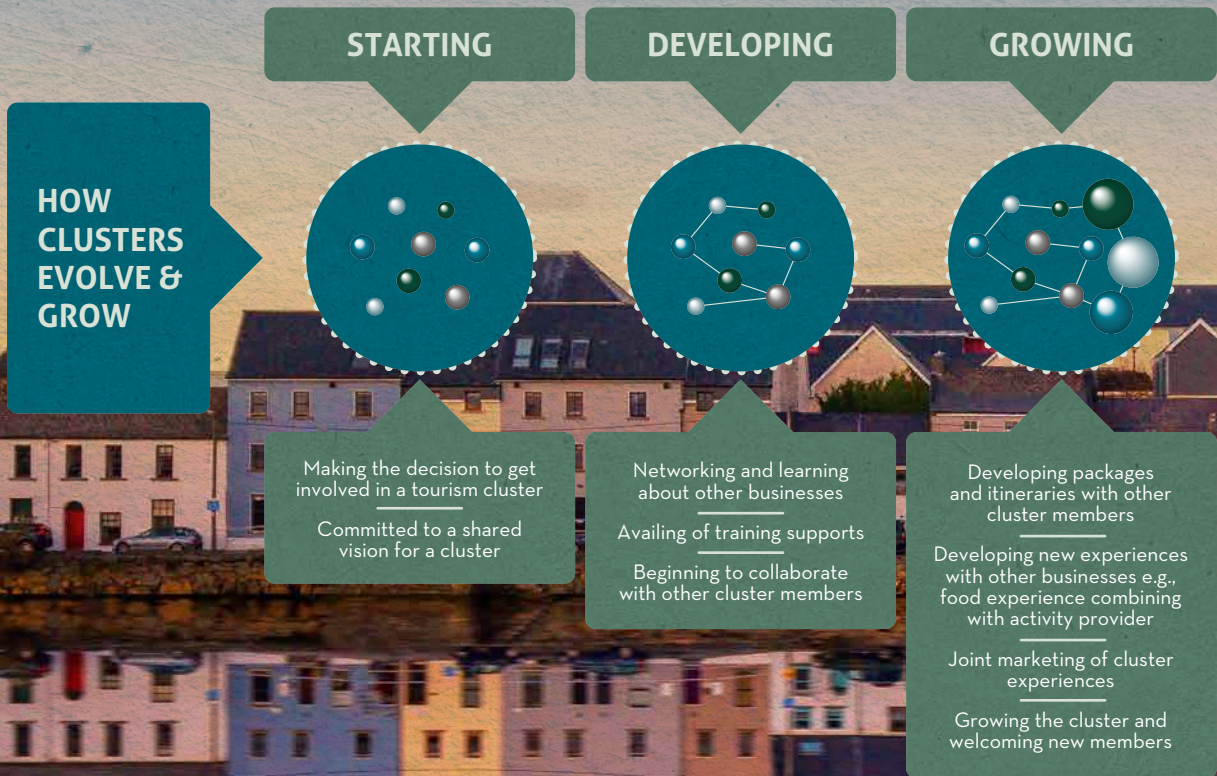
Recognising the challenges facing the industry in terms of labour shortages, we will deliver supports in a number of ways

**Account Management**

The Wild Atlantic Way regional team will engage with industry on a regular basis through the Key Account Management process to provide a streamlined and supportive two-way communication and engagement structure.

**Network and Cluster Development**

The agreed development goals of the destinations as outlined in their DEDPs will be achieved through a Cluster Development Programme Framework (see diagram below). The framework will be based on programme creation relative to the destination maturity level.



Source: Repucon Consulting.

**National Support Programmes**

Fáilte Ireland will continue to deliver national and sectoral specific programmes based on the prioritised needs identified through engagement with industry and the needs of the destinations.



**STRATEGIC INITIATIVES.**

- 1.** Survive to thrive - Provide a range of training and mentoring supports to tourism businesses in the region to ensure that they survive to thrive over the period of this strategy and that no significant providers close down due to the effects of global events over the next five years.
- 2.** Establish a revamped process within the region and deliver targeted supports through the Key Account Management process which will benefit the wider destination.
- 3.** Fáilte Ireland will deliver a suite of capability building supports to address issues within the industry, where appropriate in conjunction with sectoral representative bodies.
- 4.** Deliver multi-annual, multi-modular development programmes for the 16 Destination and Experience Development Plans on the Wild Atlantic Way. These programmes will be tailored to the relevant maturity level of each destination. Establish strong and effective networks in advance of the preparation of a DEDP for these destinations.
- 5.** Support the industry to increase the number of saleable experiences that are available to the domestic and overseas markets in the region and help businesses build their distribution and sales/marketing capabilities so that they successfully contract and sell.
- 6.** Harness a new online learning platform to ensure all businesses have access to relevant content that can be consumed at a pace that they can control.
- 7.** Build sufficient awareness of Local Enterprise Office (LEO) and Education Training Board (ETB) services to direct businesses to all available supports, in addition to those offered by Fáilte Ireland.
- 8.** Fáilte Ireland will work with a number of State agencies, such as SEAI, and industry groups to support the industry in reaching its carbon reduction targets. We will also support the uptake of sustainability measurement and certification programmes at both enterprise and destination levels.
- 9.** Develop opportunities for eco-tourism or slow tourism clusters to be established throughout the region, based on the models of the Burren Eco-tourism Network in Co. Clare and the Slow Adventure network in Co. Leitrim.



### 3.8. DISTRIBUTION AND BUSINESS DEVELOPMENT STRATEGY

#### RATIONALE

Distribution Plans will be designed for each of the DEDPs on the Wild Atlantic Way in accordance with the regional and destination levels of maturity. The focus on the southern half of the Wild Atlantic Way will be on ensuring the product remains refreshed and exciting for tour operators with consistent

destination appeal. The northern half of Wild Atlantic Way is not as recognised internationally providing a very significant opportunity for growth. The focus in this area will be on establishing new and incremental business opportunities while increasing its profile as a compelling destination for the international visitor.



Source: Fáilte Ireland.



## **STRATEGIC FOCUS FOR DISTRIBUTION AND BUSINESS DEVELOPMENT – ADDRESSING OUR STRATEGIC OBJECTIVES**

**STRATEGIC OBJECTIVE 1: GROW THE YEAR-ROUND APPEAL OF THE WILD ATLANTIC WAY DOMESTICALLY AND INTERNATIONALLY ENSURING WE ATTRACT AND DISPERSE HIGH VALUE VISITORS INTO AND THROUGHOUT THE REGION.**

**STRATEGIC OBJECTIVE 5: ENABLE AND ASSIST THE INDUSTRY TO GROW ITS CAPACITY AND CAPABILITY SO THAT IT CAN THRIVE OVER THE PERIOD OF THIS STRATEGY.**

### **Digital that Delivers Programme**

Fáilte Ireland will work to support tourism businesses to enhance their digital presence and capability through its Digital That Delivers Programme. The initial focus will be on the attractions, activities and tours businesses as research has indicated this is where the greatest opportunity lies in the short-term. From there, we will work to support other sectors of the industry subject to the required funding being made available by Government.

The programme will provide businesses with technical and practical support to drive operational efficiencies through new technologies. It will educate participants in how to distribute products via third party channels such as online travel agents (OTAs), aggregators and tour operators. It will allow them to enhance their own websites and digital marketing content, while also optimising their digital channel performance.



**STRATEGIC INITIATIVES.**

- 1.** Continually gather insights from buyers in order to inform the development of saleable visitor experiences within the region.
- 2.** Prepare a Distribution Plan for each DEDP in the Wild Atlantic Way region with best prospect markets identified for each according to destination maturity.
- 3.** Agree the consumer segments and target markets to deliver sustainable growth in a destination with all stakeholders, while identifying clear priorities and alignment around new experiences to be created.
- 4.** Create new itineraries for the southern and northern halves of the Wild Atlantic Way which will inspire wider exploration of the area and encourage longer dwell time.
- 5.** Drive incremental business opportunities for the northern half of the Wild Atlantic Way and raise its profile as a compelling new destination for tour operators.
- 6.** Monitor and audit experiences to align with market demand and work with industry and buyers to identify product suitable to grow international visitor numbers. Deliver the appropriate training and mentoring interventions.
- 7.** Provide multiple opportunities for experience providers to engage with Irish-based inbound agents across a range of platforms, which is critical to ensuring the viability and sustainability of our regions and destinations.
- 8.** Implement Fáilte Ireland's Digital that Delivers Programme to significantly enhance the ability of industry to target consumers at each stage of their path to purchase.



### 3.9. MARKETING STRATEGY

The overall domestic marketing objective is to motivate more adults across the island of Ireland to increase their consideration and intention to take a break in the Wild Atlantic Way by inspiring them to visit the region.



Source: Fáilte Ireland.



## STRATEGIC FOCUS FOR MARKETING – ADDRESSING OUR STRATEGIC OBJECTIVES

**STRATEGIC OBJECTIVE 1: GROW THE YEAR-ROUND APPEAL OF THE WILD ATLANTIC WAY DOMESTICALLY AND INTERNATIONALLY ENSURING WE ATTRACT AND DISPERSE HIGH VALUE VISITORS INTO AND THROUGHOUT THE REGION.**

**STRATEGIC OBJECTIVE 4: PROTECT THE CULTURAL AUTHENTICITY AND “WILDNESS” OF THE WILD ATLANTIC WAY.**

### Domestic Marketing

Wild Atlantic Way marketing programming and communications activity will be executed through the following mechanisms:

- 1. External Marketing** - Sustained demand generation activity growing our domestic leisure tourism base through innovative regional brand and destination marketing programming.
- 2. Internal Marketing** - Develop the profile of the Wild Atlantic Way among the tourism industry through continuous engagement at an individual level and through DEDP development clusters.
- 3. Alliance Marketing** - Develop a level of marketing scale through strategic marketing alliances with our broader tourism network including the tourism industry, local authorities, State bodies and national partnerships and sponsorships.
- 4. Partner collaboration and PR** - Ensure sustained communications with all key tourism influencers including the Incoming Tour Operators Association (ITOA), travel media, online influencers and leisure tourism specialists.
- 5. Digital Marketing** - embrace digital as the basis for destination marketing innovation and brand development.



**STRATEGIC INITIATIVES.**

THROUGH ITS DOMESTIC MARKETING CAMPAIGN, FÁILTE IRELAND WILL SEEK TO:

- 1.** Increase visitation to the Wild Atlantic Way during the shoulder season, thereby extending the season.
- 2.** Drive consideration for the more undiscovered parts of the region with the aim of maintaining destination competitiveness and growing visitor revenue through a greater dispersal of visitors.
- 3.** Convert repeat visitors.
- 4.** Encourage wider exploration of counties by promoting all there is to uncover in the region.
- 5.** Increase the social media profile of the Wild Atlantic Way across all channels.
- 6.** Increase trade referrals from discoverireland.ie and social channels to industry websites.
- 7.** Increase the number of industry partner profiles on discoverireland.ie
- 8.** Increase brand adoption by industry and communities along the Wild Atlantic Way.
- 9.** Bring the essence of the Wild Atlantic Way to life for consumers by profiling its characters and communities in an engaging and authentic way.
- 10.** Promote the three Wild Atlantic Way looped drives (Shannon Estuary Way, Mulroy Drive and Burren Discovery Trail).
- 11.** Co-ordinate with local authorities, destination marketing groups and other stakeholders to align brand and destination messaging ensuring better cut-through to market and budget efficiencies.
- 12.** Marketing at the level of the business: build-out imagery, video and marketing supports on Ireland's Content Pool and failteireland.ie. Industry can use this to leverage Fáilte Ireland campaigns in addition to supporting individual business marketing and sales activities.
- 13.** Increase utilisation of all digital marketing assets and best in class content by the industry.
- 14.** Through the Digital that Delivers Programme, provide an excellent “shop window” and digital footprint for activity providers and attractions in particular.



## Overseas Marketing

In collaboration with Tourism Ireland, the tourism industry will be supported to re-engage with overseas buyers via B2B platforms, buyer FAMs and an International Publicity Programme which matches the best prospects for overseas coverage with products that allow for sustainable and strategic growth. Fáilte Ireland will pre-qualify, prepare and mobilise industry to support Tourism Ireland overseas platforms.

Through the Brand Collaboration Group, Fáilte Ireland will partner with colleagues in Tourism Ireland to ensure they have a steady flow of “new news” to help support their overseas markets-based consumer marketing activities.

Both agencies will also pool Wild Atlantic Way destination and product content to support Irish industry in its own marketing and sales development efforts.

Tourism Ireland will actively promote the Wild Atlantic Way internationally to drive increased overseas revenue.

Fáilte Ireland will create a more sustained partnership and focus with Tourism Northern Ireland, Donegal County Council, Derry-Londonderry City Council and Tourism Ireland to better partner on the Wild Atlantic Way and the Causeway Coast for the mutual benefit of the northwest



## 3.10. COMMUNITY ENGAGEMENT

### RATIONALE

The landscape, people and communities that live along the west coast of Ireland, together with their culture and heritage, are key assets of the Wild Atlantic Way and have played a key role in driving its success. Increased awareness of the character of the Irish Atlantic culture will heighten visitors' desire to return and explore other parts of the Wild Atlantic Way. However, this unique and distinctive Atlantic culture of the region, and within it, the Irish-speaking Gaeltacht areas, is a living culture which is fragile and must be cared for and protected. It must not be eroded or diluted by tourism, but rather tourism should be designed and managed to have a regenerative effect on this culture. Fáilte Ireland will work with local authorities, relevant State agencies – chief among them Údarás na Gaeltachta – and community groups to ensure that this is the case.

Striking the appropriate balance between facilitating visitors to the Wild Atlantic Way and protecting the integrity, authenticity and vibrancy of the Atlantic culture is the essence of sustainable tourism, which is the core objective of this regional tourism development strategy. The previous **Wild Atlantic Way Operational Programme 2015 – 2019** recognised that there is a distinct Atlantic culture where people live a life shaped by the Atlantic.

There is a fundamental character and coherence to the Irish Atlantic seaboard as a unified cultural entity and it is an objective of this strategy to both raise awareness of it and help to conserve it. This is a specific bio-geographical region where common cultural responses have created a distinct Atlantic heritage. People have responded to the ocean, and its wildness, over several millennia to create a unique cultural heritage area that is Atlantic Ireland.

Fáilte Ireland will continue to create a consciousness of Irish Atlantic culture both in Ireland and internationally through the Wild Atlantic Way. In particular, we will facilitate local communities in raising awareness about their unique Irish Atlantic culture with visitors, in association with the local authorities and other partners.

Local communities are the ultimate owners of the Wild Atlantic Way and Fáilte Ireland will work to enhance this sense of ownership and in working with its partners will ensure that tourism in-region results in direct benefits for local communities. This enables local communities to become custodians and advocates for the brand, ensuring there are no negative impacts for them.

### Tourism Approval Rating

Each year, Fáilte Ireland undertakes a national survey to gauge the level of public support towards domestic and overseas tourism among local communities throughout every county in Ireland. The Tourism Approval Rating (TAR) is calculated through this survey. Public support for tourism in Ireland reduced in the 12 months up to June 2021 compared with the previous year (July 2019 – June 2020), demonstrating the negative impact Covid-19 has had on residents' attitudes.

Ireland's TAR rating has always been high and this is even more obvious when we benchmark Ireland internationally (New Zealand and Australia). While we saw a slight decrease in the score over the Covid-19 pandemic (more so for overseas tourism) the overall rating is still positive and improved from approving of overseas tourism to accepting it on the 6-point TAR scale – Advocacy, Approval, Acceptance, Limited Acceptance, Threatened Acceptance and Disapproval. At the end of 2021, attitudes towards tourism tended to be more positive. Most Irish residents continue to agree that they personally benefit from tourism. While some believe they have experienced some adverse impact from tourism activity in their local area, most believe that enough action has been taken to address those issues.

Fáilte Ireland will continue to monitor public support for tourism in the Wild Atlantic Way region over the course of this strategy.



## Community Tourism Enterprises

In 2019, research was commissioned into the nature and socio-economic impacts of community-based tourism across a number of regions. For the Wild Atlantic Way, its community-based tourism enterprises are a particularly rich resource that offer the visitor a uniquely authentic experience by engaging directly with members of the local community. Furthermore, in many of the less visited parts of the Wild Atlantic Way, the tourism industry relies heavily on the community tourism enterprise sector to provide many of its visitor experiences.

The research revealed the range of challenges that many community-based enterprises experience, including a lack of strategic planning and business

management, access to capital and operational funding, rising insurance costs, a need for succession planning, a shortage of and burn-out in volunteers, and a lack of capacity for commercialisation of opportunities.

Enhanced capacity building and activation for improved market accessibility will help to build a vibrant regional destination by strengthening authentic community experiences. By providing easy access for visitors to meet local people, hear stories and interact with nature, cultural heritage and outdoor activities, the overall offer of the Wild Atlantic Way will be significantly strengthened.

## STRATEGIC FOCUS FOR COMMUNITY ENGAGEMENT – ADDRESSING OUR STRATEGIC OBJECTIVES

**STRATEGIC OBJECTIVE 4: PROTECT THE CULTURAL AUTHENTICITY AND “WILDNESS” OF THE WILD ATLANTIC WAY.**

**STRATEGIC OBJECTIVE 5: ENABLE AND ASSIST THE INDUSTRY TO GROW ITS CAPACITY AND CAPABILITY SO THAT IT CAN THRIVE OVER THE PERIOD OF THIS STRATEGY.**

**STRATEGIC OBJECTIVE 6: FOSTER STRONG COALITIONS OF INDUSTRY AND STAKEHOLDERS WITH A COMMON PURPOSE IN CREATING FLOURISHING DESTINATIONS AND THRIVING COMMUNITIES WHILE ALSO BUILDING A SUSTAINABLE MODEL OF DESTINATION DEVELOPMENT ACROSS THE WILD ATLANTIC WAY.**



**STRATEGIC INITIATIVES.**

1. Continue to build on the goodwill towards tourism among local communities in the region by engaging them in decision-making about tourism that could impact them and by listening and acting on tourism-related concerns.
2. Keep local communities informed about any Wild Atlantic Way initiatives that may be of benefit to them.
3. Continue to gather ideas from local communities about improving the experience for visitors.
4. Promote the socio-economic benefits that well-managed and sustainable tourism brings to local communities and strive to ensure that tourism positively impacts communities by providing sustainable employment and enhancing destinations, making them better places to live.
5. Engage local communities in a series of local interpretation projects, in association with relevant agencies and a range of other partners, building on previous work undertaken by these stakeholders, which explore and highlight the distinctive Irish Atlantic culture in destinations and communities all along the Wild Atlantic Way. These are opportunities for local communities to present and share their own culture, traditions and the Irish language with visitors to their area. These initiatives also encourage further dispersal of visitors along the Wild Atlantic Way.
6. Work with local communities and local tourism providers to further explore opportunities to introduce elements of the Irish Atlantic heritage and culture to existing and new tourism offerings in a way that creates richer and more authentic cultural experiences for visitors.
7. Provide training and mentoring support for community-based tourism enterprises and services to ensure that they are placed on a sustainable footing, by improving their operational, commercial, planning and governance skills in partnership with relevant agencies. Utilise Fáilte Ireland's **Tourism in the Community: A Business Toolkit for Community Tourism Projects**, in working with local community tourism projects.
8. Explore ways of leveraging community-based tourism initiatives to build loyalty among visitors.
9. Support a number of key demonstrator projects that provide a blueprint for community-led regenerative tourism projects that involve local communities and benefit them directly.



### 3.11. ENVIRONMENTAL PROTECTION & PROMOTION

The Regional Tourism Development Strategy for the Wild Atlantic Way provides a new context for how all existing and future tourism projects and initiatives are planned, developed, and managed in a sustainable and integrated manner. The VICE (Visitor, Industry, Community and Environment) Model for Sustainable Tourism is the framework adopted within this plan. Fáilte Ireland recognises

the need to integrate environmental considerations into this strategy in a way that responds to the sensitivities and requirements of the wider natural environment. Environmental considerations including water quality and amenity, climate change, traffic, biodiversity, built and cultural heritage, landscape, critical infrastructure and communities, all play a vital part in our tourism sector.

#### STRATEGIC FOCUS FOR ENVIRONMENTAL SUSTAINABILITY –

*ADDRESSING OUR STRATEGIC OBJECTIVES*

**STRATEGIC OBJECTIVE 4: PROTECT THE CULTURAL AUTHENTICITY AND “WILDNESS” OF THE WILD ATLANTIC WAY.**

**STRATEGIC OBJECTIVE 6: FOSTER STRONG COALITIONS OF INDUSTRY AND STAKEHOLDERS WITH A COMMON PURPOSE IN CREATING FLOURISHING DESTINATIONS AND THRIVING COMMUNITIES WHILE ALSO BUILDING A SUSTAINABLE MODEL OF DESTINATION DEVELOPMENT ACROSS THE WILD ATLANTIC WAY.**

#### STRATEGIC APPROACH

THE PROTECTION, ENHANCEMENT AND PROMOTION OF OUR MOST IMPORTANT TOURISM ASSET, THE NATURAL ENVIRONMENT HAS BEEN AN INTEGRAL PART OF THE FORMATION OF THIS STRATEGY AS IS EVIDENCED IN THE FOLLOWING:

1. Environmental assessments and resulting measuring and monitoring.
2. A firm commitment to ensuring sustainable and responsible tourism principles are practiced.
3. Compliance with statutory decision-making and consent-granting at strategy implementation stage; Ensuring all DEDPs are screened and where appropriate have full environmental assessments completed.
4. Integrating requirements for environmental protection and management.

This strategy is aligned with a hierarchy of statutory documents setting out public policy for land use development, tourism, infrastructure, sustainable development, environmental protection, and environmental management. These include the National Planning Framework (NPF), Regional Spatial and Economic Strategies (RSEs) and lower tier Development Plans and Local Area Plans.

Implementing the strategy will involve Fáilte Ireland helping to facilitate, promote, support and coordinate stakeholders (including local authorities,

other State agencies, tourism operators, site owners and operators, communities, and visitors) in their activities in a way that is consistent with existing and emerging plans that have been subject to environmental assessment. The strategies do not provide consent, establish a framework for granting consent or contribute towards a framework for granting consent.

Implementation of this strategy shall be consistent with and conform with the NPF, RSEs and lower-tier land use plans, including provisions relating to



sustainable development, environmental protection and environmental management that have been integrated into these documents including through SEA and AA processes. In order to be realised, projects included in this strategy (in a similar way to other projects from any other sector) will have to comply, as relevant, with various legislation, policies, plans and programmes (including requirements for lower-tier Appropriate Assessment, Environmental Impact Assessment and other licencing requirements green procurement procedures as appropriate) that form the statutory decision-making and consent-granting framework, of which the strategy is not part and does not contribute towards.

Having undergone screening, the strategies are subject to Strategic Environmental Assessment (SEA)<sup>[1]</sup> under the European SEA Directive and transposing Regulations and Stage 2 Appropriate Assessment (AA)<sup>[2]</sup> under the European Habitats Directive and transposing Regulations. The accompanying SEA Environmental Report and AA Natura Impact Statement set out the findings of the assessments and include information on environmental constraints and opportunities; most likely and important potential environmental impacts; most likely locations/concentrations of potential impacts; mitigation measures; and monitoring measures.

The SEA and AA Team worked with the strategy preparation team at Fáilte Ireland in order to integrate requirements for environmental protection and management into the strategy. The SEA identifies that the strategies, in combination with the wider statutory planning framework, will contribute towards the appropriate protection and management of environment sensitivities and resources. The AA identifies that the strategy is not expected to affect the integrity of any European site.

The SEA and AA documents provide a comprehensive description of the environmental baseline including natural heritage, ecosystem services, designated sites and protected species within and beyond the Strategy area. The findings of the SEA and AA should be read in conjunction with the Strategy.

In contributing towards any outcomes under the strategies, compliance will need to be demonstrated with, as relevant, various legislation, policies, plans and programmes (including requirements for lower-

tier Appropriate Assessment, Environmental Impact Assessment and other licencing requirements as appropriate) that form the statutory decision-making and consent-granting framework, of which the strategy is not part and does not contribute towards. Such legislation, policies, plans and programmes include:

1. Requirements for lower-tier environmental assessment, including EIA and AA;
2. Relevant land use and other sectoral plans that form part of the statutory decision-making and consent-granting framework and that have undergone environmental assessment, as appropriate, including various provisions relating to sustainable development, environmental protection and environmental management; and
3. The Climate Action Plan

## Monitoring

A SEA Environmental Monitoring Programme for the strategy will be executed during implementation and operation. Monitoring can demonstrate the positive effects facilitated by the strategy and can enable, at an early stage, the identification of unforeseen adverse effects and the undertaking of appropriate remedial action.

A focus of the programme will be to identify any specific activities that cause specific impacts and to examine whether such impacts (if they exist) have higher prevalence at certain site types.

The occurrence of persistent significant adverse environmental effects which are directly attributable to tourism would necessitate consideration of the effects in the context of the strategy and a possible review of part(s) of the strategy.

Environmental monitoring will be based around indicators that allow quantitative measures of trends and progress over time and a variety of sources of information will be used to run the programme. Environmental monitoring will be executed by Fáilte Ireland and will run concurrently with the implementation phase of the strategy itself. It will be reported on to the strategy's implementation group on an annual basis where relevant information sources allow, and the findings of the monitoring will influence the actions of the strategy as it progresses.



The monitoring will be linked directly to the strategy KPIs, including monitoring of visitor numbers where relevant.

Environmental monitoring for the strategy and other existing/future Fáilte Ireland plans, programmes, etc. may be undertaken and reported on at the same time. This monitoring will be built on and complement the work of Fáilte Ireland's new National Environmental Monitoring Programme 2021 – 2026.

With respect to infrastructural capacity (including drinking water, wastewater, waste and transport) the potential impact on existing infrastructure and the potential environmental effects of a likely increase in tourism-related traffic volumes along any routes resulting from the relevant initiative will be considered and mitigated as appropriate, where relevant.

Close collaboration will also be undertaken with the relevant stakeholders, such as local authorities and Irish Water, to ensure that any proposed tourism developments align with the capacity of the supporting critical service infrastructure.

Safeguarding of the natural environment through monitoring will also be bolstered by the requirement to consider the following guidance documents and procedures which have been and in some cases are currently being developed by Fáilte Ireland. This list will be updated over the life of the strategy as and when guidance and procedures are developed. Further details on these can be found in Appendix 2 – 8.

- Site Maintenance Guidelines;
- Visitor Management Guidelines; (while these guidelines are branded for the Wild Atlantic Way, the principles & objectives are applicable to all Fáilte Ireland Tourism regions)
- Environmental Management for local authorities and Others
- Environmental Damage Resolution Procedure
- Greenway Visitor Experience & Interpretation Toolkit
- Environmentally Responsible Promotion – Statement
- Blueway Development & Management Guide
- Sustainable Recreational Trail Development & Operation (to be developed)

## Visitor Management

In contributing towards outcomes under the strategy, partners and stakeholders shall seek to manage any increase in visitor numbers and/or any change in visitor behaviour in order to avoid significant effects including loss of habitat and disturbance, including ensuring that new projects are a suitable distance from ecological sensitivities.

Extensive research by Fáilte Ireland has shown improved environmental outcomes (including improved attainment of conservation objectives) in areas with visitor management strategies. Visitor management strategies may be required from partners and stakeholders who are contributing towards outcomes under the strategy, as relevant and appropriate.

Visitor management strategies will be required for proposed plans, programmes and projects that are to receive funding as relevant and appropriate.

## Green Infrastructure and Ecosystem Services

Green infrastructure can be defined as a strategically planned network of natural and semi-natural areas. In contributing towards outcomes under the strategies, partners and stakeholders shall contribute towards the maintenance of existing green infrastructure and its ecosystem services, taking into account the output of the Mapping and Assessment of Ecosystem Services project being undertaken by the NPWS.

Proposals for the development of any green infrastructure should demonstrate the synergies that can be achieved with regard to the provision of open space amenities, sustainable management of water, protection and management of biodiversity, protection of cultural heritage, and protection of protected landscape sensitivities.

## Greenway Development

Extension of existing greenways and future development of new greenways and blueways should complement and integrate rather than replace existing green infrastructure. Stakeholders considering the development of greenways and blueways should have regard to the Fáilte Ireland publication **Greenway – Visitor Experience & Interpretation Toolkit** and **Connecting with nature for health and well-being EPA Research Report 2020**.



## Environmental Damage Resolution

Action-based responses are essential at site-specific level in response to instances of environmental perturbation. Although the strategy is not envisaged as being likely to directly result in any such instances of environmental perturbation, it forms part of a hierarchy of tourism initiatives, including lower tier DEDPs, and the wider statutory planning framework. The Environmental Damage Resolution procedure provides for a consistent approach in responding to such issues and is available for integration at DEDP and site-specific levels.

## Environmentally Responsible Tourism Promotion & Campaign Statement

Environmental considerations will be integrated into promotional processes and environmentally responsible tourism campaigns will be required. Such campaigns will garner environmental stewardship that will help to ensure environmental protection and management. Promotional processes will be informed by environmental considerations, including available capacity, at a local level.

## Site Management

Fáilte Ireland's extensive monitoring of the effects of tourism to date has shown predictors of impact occurrence to include site type, group type, the number of activities, activity intensity, and the interaction between activity intensity and abundance. Site management must consider these factors in seeking to reduce the potential for impacts to occur and to remove impacts.

## Climate Action

Fáilte Ireland will comply with the most up to date Climate Action Plan, National Climate Change Adaptation Framework and National Mitigation Plan, including contributing towards efforts to decarbonise the tourism sector, improve low carbon travel, such as walking and cycling, and the circular economy.

Fáilte Ireland's 2023 corporate strategy will identify progress in relation to relevant actions as set out under the Climate Action Plan and the meeting of national and sectoral commitments relating to emission targets.

**STRATEGIC INITIATIVES.**

- 1.** Establish the Wild Atlantic Way as a leading international sustainable tourism destination.
- 2.** Benchmark the destinations within the region against an internationally recognised sustainability standard and create a plan to improve their sustainability rating over the course of this strategy.
- 3.** Promote responsible tourism practices among tourism providers and encourage them to pursue sustainability certification as appropriate.
- 4.** Promote the Leave No Trace principles to both visitors and tourism providers.
- 5.** Ensure the conservation and maintenance of key elements of biodiversity as part of any development projects to ensure they do not contribute to biodiversity loss or deterioration, i.e., there should be no net loss of biodiversity.
- 6.** When implementing initiatives associated with land and water-based initiatives, it is our objective to ensure the containment and control of Invasive Alien Species (IAS) with accordance with the EC (Birds and Natural Habitats) Regulations, 2011.
- 7.** As part of the implementation of this strategy, we will identify opportunities to enhance or create Green Infrastructure (GI) and ecological corridors which can provide important links in the connectivity of European Natura 2000 sites and other protected sites.
- 8.** We will ensure that all proposed land development in the RTDS incorporates positive biodiversity measures as standard practice. Actions can include simple measures, e.g., all new public buildings incorporate nesting boxes for swifts and/or bat boxes and/or the creation of wildlife habitats on public open spaces, to more ambitious measures that will ensure “biodiversity net gain” on public development schemes.
- 9.** Implement the Environmental Monitoring Programme, as referenced above, to ensure that the effects of tourism on environmental, heritage and cultural assets is monitored to allow for early detection of any possible issues.
- 10.** Undertake a series of initiatives with a range of stakeholders to raise awareness of the wealth of wildlife and biodiversity along the Wild Atlantic Way and identify the best sites at which to view wildlife and marine, in accordance with good environmental practice.
- 11.** Fáilte Ireland will work with a number of State agencies, such as SEAI, and industry groups to support the industry in reaching its carbon reduction targets. We will also support the uptake of sustainability measurement and certification programmes at both enterprise and destination levels.
- 12.** Support tourism development in Decarbonisation Zones as differentiators for the visitor.











# 4. MEASURING SUCCESS



## 4.1. MEASURING SUCCESS

The following is a series of desired outcomes that are linked to four overarching goals set out under the VICE model, each with its own Key Performance Indicators (KPIs).

VISITOR KPIs	
TO ENSURE THAT IRELAND'S WILD ATLANTIC WAY DESTINATIONS ARE RECOGNISED BY THE VISITOR, THAT THE BRAND IS COMPELLING TO OUR TARGET MARKET SEGMENTS AND THAT THE EXPERIENCE EXCEEDS THEIR EXPECTATIONS.	
KPIs.	DATA SOURCE.
1. The Wild Atlantic Way is in the top five touring routes in the world.	<ul style="list-style-type: none"> <li>International benchmarking.</li> </ul>
2. New and improved all-weather attractions have given visitors rainy day options and more reasons to come outside the summer months.	<ul style="list-style-type: none"> <li>Year-on-year increase in satisfaction and dispersal as measured by the Survey of Overseas Travellers (SOT).</li> </ul>
3. The southern half of the Wild Atlantic Way has seen a more even dispersal of visitors into towns and villages within the region and visitor satisfaction has increased.	<ul style="list-style-type: none"> <li>Year-on-year increase in dwell time and a decrease in congestion metrics as measured by the Destination Attitude Survey (DAS).</li> </ul>
4. Congestion has been alleviated and dwell time increased at iconic attractions and Signature Discovery Points.	<ul style="list-style-type: none"> <li>Year-on-year increase on the three metrics as measured by Tourism Ireland's Global Travel Index and Fáilte Ireland's Behaviour and Brand Tracker (BBT).</li> <li>Year-on-year increase in tourists measured by the SOT.</li> </ul>
5. Increase in awareness, consideration, and intent for the northern half of Wild Atlantic Way.	<ul style="list-style-type: none"> <li>Fáilte Ireland's DAS.</li> </ul>
6. The northern half of Wild Atlantic Way has seen a steady increase year-on-year in international visitors.	<ul style="list-style-type: none"> <li>Year-on-year increase in numbers of visitors to the northern half of the Wild Atlantic Way as measured by the SOT.</li> </ul>
7. There are 5 visitor attractions of scale in the northern half of the Wild Atlantic Way attracting 200k+ visitors with evidence of increased dwell time in the surrounding destination.	<ul style="list-style-type: none"> <li>Fáilte Ireland's Visitor Attractions Survey (VAS).</li> <li>Industry networks surveyed by Wild Atlantic Way team.</li> </ul>

KPIs and metrics will evolve during the life of this RTDS.



# INDUSTRY KPIs

TO DELIVER BALANCED AND SUSTAINABLE REVENUE AND QUALITY JOBS GROWTH WITH GREATER GEOGRAPHIC AND SEASONAL SPREAD.

KPIs.	DATA SOURCE.
1. Revenue recovered to 2019 levels by 2026 with capacity to grow by a further 5%.	<ul style="list-style-type: none"> <li>Survey of Overseas Travellers (SOT).</li> <li>Fáilte Ireland estimates of Domestic Visitor Spend.</li> </ul>
2. The season has been extended well into the shoulder months, creating more sustainable jobs.	<ul style="list-style-type: none"> <li>Accommodation Occupancy Survey.</li> <li>Industry networks surveyed by Wild Atlantic Way team.</li> </ul>
3. Brand adopted and utilised by industry in its sales/marketing activities.	<ul style="list-style-type: none"> <li>Industry networks surveyed by Wild Atlantic Way team.</li> </ul>
4. Increase in the number of highly optimised industry websites with connected distribution.	<ul style="list-style-type: none"> <li>Fáilte Ireland's Digital That Delivers Survey.</li> </ul>
5. Strong, coordinated tourism networks in each DEDP region with enhanced sales capability.	<ul style="list-style-type: none"> <li>Industry networks surveyed by Wild Atlantic Way team.</li> </ul>

KPIs and metrics will evolve during the life of this RTDS.

# COMMUNITY KPIs

TO ENSURE THAT THE WILD ATLANTIC WAY DELIVERS JOBS AND SOCIAL BENEFITS TO LOCAL COMMUNITIES ON THE WEST COAST AND CONTRIBUTES TO A BETTER PLACE TO LIVE FOR EVERYONE.

KPIs.	DATA SOURCE.
<p><b>1.</b> Communities maintain and/or improve their Tourism Approval Rating (TAR) demonstrating that they have embraced tourism and value a visitor economy that provides diverse employment opportunities that complement their lifestyles.</p>	<ul style="list-style-type: none"> <li>Fáilte Ireland’s Community Feedback Survey.</li> </ul>
<p><b>2.</b> Year-on-year increase in employment in the sector.</p>	<ul style="list-style-type: none"> <li>Fáilte Ireland data and/or CSO data.</li> </ul>
<p><b>3.</b> Communities continue to champion and embrace the Wild Atlantic Way, sharing their stories and culture with visitors and are powerful advocates for the region.</p>	<ul style="list-style-type: none"> <li>Complementary research to be developed to track community engagement with the Wild Atlantic Way brand.</li> </ul>
<p><b>4.</b> Communities engage with local DEDPs on a sustained basis.</p>	<ul style="list-style-type: none"> <li>Industry networks surveyed by Wild Atlantic Way team.</li> </ul>

KPIs and metrics will evolve during the life of this RTDS.





# ENVIRONMENT KPIs

TO ENSURE THAT THIS STRATEGY FACILITATES THE PROTECTION AND ENHANCEMENT OF THE ENVIRONMENT AS THE FUNDAMENTAL ASSET OF TOURISM IN THE REGION, IN ASSOCIATION WITH OTHER KEY STAKEHOLDERS.

KPIs.	DATA SOURCE.
1. This RTDS demonstrates full compliance with all relevant requirements arising from planning & environmental law.	<ul style="list-style-type: none"> <li>Strategic Environmental Assessment, Appropriate Assessment &amp; National Environmental Monitoring Programme 2021 – 2026.</li> </ul>
2. Tourism businesses are on track to meet their carbon reduction targets as per the Carbon Budget and in line with the Climate Action Plan 2021.	<ul style="list-style-type: none"> <li>Surveys will be conducted regularly during lifetime of strategy to monitor progress of tourism businesses toward this goal.</li> </ul>
3. Tourism activities are not contributing to environmental damage or significant loss of habitat or species.	<ul style="list-style-type: none"> <li>Fáilte Ireland’s National Environmental Monitoring Programme 2021 – 2026.</li> </ul>
4. All high footfall sites have visitor management plans in place.	<ul style="list-style-type: none"> <li>Data from National Transport Authority (NTA).</li> </ul>
5. Year-on-year improvement in the provision of public transport links in the region and “last mile” transport links are in place for all key attractions together with improved EV charging infrastructure.	<ul style="list-style-type: none"> <li>Data from National Transport Authority (NTA).</li> </ul>
6. The region has significantly developed outdoor assets and infrastructure enabling visitors to discover the landscape in a sustainable manner.	<ul style="list-style-type: none"> <li>Fáilte Ireland Consumer Sustainability Tracker (CST).</li> <li>Industry networks surveyed by Wild Atlantic Way team.</li> </ul>
7. Year-on-year increase in the uptake by industry of sustainability/environmental certification.	<ul style="list-style-type: none"> <li>Certification schemes.</li> </ul>

KPIs and metrics will evolve during the life of this RTDS.





# 5. APPENDICES



Donegal

Leitrim

Sligo

Mayo

Galway

Clare

Limerick

Kerry

Cork

## 5.1. APPENDICES

### APPENDIX A1

#### *RELEVANT NATIONAL AND REGIONAL POLICIES, PLANS AND STRATEGIES.*

PROJECT 2040 – National Planning Framework.

National Development Plan 2021 – 2030.

Climate Action Plan 2021.

People, Place & Policy: Growing Tourism to 2025, Department of Transport, Tourism and Sport

- *Tourism Action Plan 2019 – 2021.*
- *Actions to Promote Sustainable Tourism Practices 2021 – 2023, Sustainable Tourism Working Group.*

Our Rural Future: Rural Development Policy 2021 – 2025.

Strategy for the Future Development of National and Regional Greenways, Department of Tourism, Transport and Sport (July 2018).

Blueway Management and Development Guide, Blueways Ireland.

National Physical Activity Plan for Ireland 2013 – 2025, Healthy Ireland.

Tourism Recovery Plan 2020 – 2023, Tourism Recovery Task-force.

Regional Spatial and Economic Strategy for the Southern Region (Southern Regional Assembly).

Regional and Economic Strategy 2019 – 2031 (Eastern & Midland Regional Assembly).

Regional Spatial and Economic Strategy 2020 – 2032 (Northern & Western Regional Assembly).

Dept of Business Enterprise & Innovation

- *Dublin Regional Enterprise Plan.*
- *Midlands Regional Enterprise Plan.*
- *North-West Regional Enterprise Plan.*
- *Mid East Regional Enterprise Plan.*
- *West Regional Enterprise Plan.*
- *Mid-West Regional Enterprise Plan to 2024.*

Údarás na Gaeltachta

- *Údarás na Gaeltachta Strategic Plan 2021 – 2025.*
- *Gaeltacht Area Language Plans (LPT).*

OPW/NPWS

- *Heritage Ireland 2030.*

Coillte

- *Outdoor Recreation Plan 2017 – 2021.*
- *Coillte Recreation Policy 2016.*



## LOCAL AUTHORITY DEVELOPMENT PLANS AND TOURISM STRATEGIES

LOCAL AUTHORITY	DEVELOPMENT PLAN	TOURISM STRATEGY	TRANSPORT STRATEGY
<b>DONEGAL COUNTY COUNCIL</b>	Donegal County Development Plan 2018 – 2024. Draft Donegal County Council Tourism Strategy 2020 – 2025.		
<b>SLIGO COUNTY COUNCIL</b>	Sligo County Development Plan 2017 – 2023. Draft Sligo County Development Plan 2023 – 2029.	County Sligo Tourism Strategy 2018-2023.	
<b>MAYO COUNTY COUNCIL</b>	Draft Mayo County Development Plan 2022 – 2028.		
<b>GALWAY COUNTY COUNCIL</b>	Draft Galway County Development Plan 2022 – 2028.		Galway Transport Strategy.
<b>GALWAY CITY COUNCIL</b>	Galway City Development Plan 2017 – 2023. Draft Galway City Development Plan 2023 – 2029.	Galway to 2025 – Preparing a Tourism Strategy for Galway.	
<b>CLARE COUNTY COUNCIL</b>	Clare County Development Plan 2017 – 2023.	Clare Tourism Strategy 2030.	
<b>LIMERICK CITY &amp; COUNTY COUNCIL</b>	Limerick 2030 Economic & Spatial Plan. Draft Limerick County Development Plan 2022 – 2028.	Limerick Tourism Development Strategy 2019 – 2023.	Draft Limerick Shannon Metropolitan Area Transport Strategy.

LOCAL AUTHORITY	DEVELOPMENT PLAN	TOURISM STRATEGY	TRANSPORT STRATEGY
<b>KERRY COUNTY COUNCIL</b>	Kerry County Development Plan 2022 – 2028.	The County Kerry Tourism Strategy and Action Plan 2016 – 2022.	
<b>CORK COUNTY COUNCIL</b>	Cork 2050. Cork County Development Plan 2022 – 2028.	Cork County Council Corporate Plan 2019 – 2024.	The Cork Metropolitan Area Transport Strategy (CMATS) 2040.

**APPENDICES A2 – A8 TO THIS REGIONAL TOURISM DEVELOPMENT STRATEGY ARE CONTAINED IN A SEPARATE VOLUME AND ARE AS FOLLOWS:**

- A2:** Site Maintenance Guidelines.
- A3:** Visitor Management Guidelines.
- A4:** Environmental-Management-for-Local-Authorities-and-Others.
- A5:** Environmental Damage – Resolution Procedure.
- A6:** Greenway Toolkit.
- A7:** Responsible Promotion – Statement.
- A8:** Blueway Development and Management Guide.





