Tourism is a €2.6 billion industry along the Western Seaboard, providing employment for more than 100,000 people. Western counties are more dependent on tourism than other parts of the country, with more than one in every seven jobs in Kerry and Donegal in the tourism sector. Tourism businesses are the mainstay of many communities as the industry is a vital contributor to local economies and the quality of life of residents along the Western Seaboard. These are among the principal findings of the Irish Tourist Industry Confederation’s (ITIC) latest review of tourism in the west of Ireland.

The potential to grow tourism in the West is significant as demand for holidays in Ireland returns to growth. Not only have visitor numbers and expenditure to the West been growing in recent years, but the area has been regaining share of the demand for holidays in Ireland. The diverse landscape, heritage, cultural and outdoor experiences, coupled with its people and tradition of hospitality, uniquely positions the West as the quintessential Ireland destination. Research shows that the West can deliver on the proven appeals and aspects of a satisfying Irish holiday for the international and domestic tourist. Furthermore, it makes economic sense to grow tourism along the Western Seaboard where many communities have fewer options for employment and wealth generation. From a national perspective greater economic activity in the West driven by tourism supports a better balance in regional development across the country and underpins the sustainability of communities along the Western Seaboard.

The future is not without its challenges. The West suffers from an infrastructural deficit due to underinvestment over many years. There are challenges in getting the marketing right, in ensuring adequate staffing to deliver a high quality visitor experience, and in making it easier for the visitor to explore the West. There is the added test of delivering a competitive tourism product which sustains the profitability of businesses and appeals to investors.

The key to a future of growth for the Western Seaboard is a new collaborative approach between the tourism industry and Government to address the challenges and capitalise on the market opportunities. ITIC, following extensive consultation with stakeholders, sets out a plan to deliver a strategic advantage for the West. This tourism strategy is designed to bring more visitors to the Western Seaboard, to encourage them to spend more and stay longer, thereby increasing revenue and industry profitability for the benefit of all. The goals can be achieved through three pillars for growth: Investment, Branding and Leadership.

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1 Western Seaboard or “the West” is defined for the purposes of this report as encompassing the coastal counties from Donegal to Cork.
Tourism in the West – an engine for growth and jobs

SUMMARY

A PLAN FOR GROWTH

Vision

• The west as Ireland’s premier tourism destination creating more jobs and greater prosperity

Goals

• Capture a greater share of Ireland’s growing tourists’ expenditure - at least 55% by 2020

Strategy

• Capitalise on the west’s diversity of visitor experiences in meeting the needs of today’s and tomorrow’s domestic and overseas tourists with a focus on markets offering highest return

Investment

• State investment to address infrastructure deficit - roads, broadband, water, and public transport.
• Business investment to provide a competitive edge, including staffing and new visitor experiences

Branding

• Deepen & strengthen the brand proposition that is the Wild Atlantic Way, broadening beyond the route to create a compelling destination appeal

Leadership

• Establish industry led alliance to improve collaboration and co-ordination with the public sector in guiding tourism development in the west

November 2015
Leadership and collaboration

- The prioritisation of the development of tourism makes good economic sense, as it is one of a few industry sectors with a proven record of creating jobs and wealth along the Western Seaboard.

- Establish an industry-led alliance to improve collaboration and the co-ordination of tourism development along the Western Seaboard. Up to three geographically based forums are proposed, with an annual overarching meeting, to allow for engagement by the private and public sectors in planning and monitoring tourism development and marketing growth strategies.

- Agree a 3 to 5 year strategic investment programme through advocacy with Government and the alignment of plans by local authorities and relevant state bodies, based on multi-annual budget commitments. Greater engagement with the Office of Public Works, National Parks & Wildlife Service, Coillte and the Western Development Commission in developing tourism.

- Develop best practice and key performance indicators to measure and monitor outputs creating greater transparency and accountability in the system.

A distinctive brand positioning for the West

- Build on the successful Wild Atlantic Way (WAW) initiative to deepen and broaden this distinctive brand proposition for the West to communicate a differentiated authentic Ireland experience to prospective visitors. The focus would be to evolve the WAW coastal route into the branding of a wider area as Ireland’s top compelling ‘must visit’ year round destination.

- Agree a focused marketing plan with Tourism Ireland and Fáilte Ireland, for overseas and domestic markets respectively, based on an agreed alignment with industry and destination campaigns and resources. The new collaborative partnership would be based on agreed targets and monitoring mechanisms.

- Specific season extension marketing initiatives are required to improve the sustainability of businesses and secure year round employment for more people.

Infrastructure and investment

- Focus state investment on redressing the infrastructure deficit – communications, transport and utilities – to remove obstacles to tourism growth.

- Continued investment required to complete the WAW project, including the prompt completion of the agreed 15 signature points.

- Secure at least 50% of proposed Government investment in tourism for the West. ITIC would suggest at least €125 million be earmarked for the West for the period 2016-2020.

- Ensure that the West is specifically identified in the product development plans of Fáilte Ireland and Local Authorities as well as in the marketing programme expenditure by Tourism Ireland. Agree investment priorities by area and aim to deliver at least one flagship additional attraction within the next 5 years.

- Focus investment on authentic ‘real Ireland’ experiences: Heritage and culture; Outdoor activities and exploration; Maritime tourism; Food and drink; The Gaeltacht; and Festivals and Events. A particular focus on the development of extended walking and cycling ways, including the creation of a long distance Pilgrim Way.
**Skills and labour**

- Prioritise the immediate needs of recruiting and maintaining an expanded workforce necessary to cater for tourism growth. This may require specific employment and training incentives.
- Secure appropriate education and training programmes to meet the needs of the industry, including negotiating a more proactive alignment of courses provided by the Institutes of Technology and the requirements of businesses.
- Expansion of business to create more full time jobs in addition to the significant level of seasonal employment.

**Access to the West**

- Secure new direct summer services from the principal gateways in Germany, France, Italy, Spain and Scandinavia; Europe being the largest source market of visitors to the West.
- Encourage greater strategic co-ordination between the airports along the Western Seaboard to improve the chances of sustainable new route development.
- Prioritise the expansion of transatlantic services into the West via the Shannon Gateway.

**Performance indicators**

- Lobby the Central Statistics Office and Fáilte Ireland to improve the quality and timeliness of performance data
- Design a suite of performance metrics to better align with the needs of the industry in the West.
Tourism in the West – an engine for growth and jobs

KEY FINDINGS

Tourism is a €2.6 billion industry along Ireland’s western seaboard.

Tourism provides almost 100,000 jobs that support families in every county along the Atlantic coast.

Tourism helps define the western seaboard, perhaps more than any other single sector of the economy.

[FINDINGS based on 2014 data, the latest available performance metrics]

The western seaboard is highly dependent on tourism

The counties along the Atlantic coast are more heavily dependent on tourism than in any other part of the country. For example, at least one in every five businesses in counties Kerry and Leitrim is engaged in tourism, with an almost equal dependency on tourism businesses in County Donegal. Tourism accounts for close to 15% of all business enterprises in counties Mayo, Clare, Sligo, Galway and Limerick. This compares to less than 10% along the east coast.

Almost 100,000 jobs along the western seaboard depend on tourism, with western counties more dependent on tourism for employment that most other counties in Ireland.

Percentage of employment in tourism

In Kerry at least one in every seven people in employment is engaged in the tourism and hospitality sector. Tourism is also a major source of employment in counties Donegal and Galway, proving jobs for more than 10% of the workforce.

Employment in the ‘Accommodation and Food Services’ sector, an accepted proxy indicator for tourism employment, grew by 15% between 2012 and 2014 in the western region.2

It is estimated that over 100,000 were employed in the sector over summer 2014. A recent survey shows that just over two out of every five (44%) tourism businesses in the West had hired more staff in 2015.

Tourism offers better potential for economic development than most other sectors. Together with the agri-food sector, tourism represents the best prospect for employment as the industry is based on natural attributes of the area and its people. Even in the depth of the recent recession, tourism start-ups formed a significant part in economic development accounting for over 20% of new enterprises in counties Donegal and Mayo and upwards of 16% of new business ventures in other western counties.

Source: McNealy & Delaney, 2013, Ibec calculations

Source: Fáilte Ireland

Tourist spend in the West 2014

KEY FINDINGS

Overseas €1,722m

Domestic €850m

Tourist spend in the West 2014

Source: Fáilte Ireland

[The Western Region’s Labour Market 2004-2014; Western Development Commission Report March 2015]
Value of Overseas Tourism to the West

Almost half of the expenditure within Ireland by overseas visitors is spent along the western seaboard, as the West regains share.

Encouragingly overseas earnings from tourism along the western seaboard grew by 21% in 2014, yielding an additional €300m into the economy.

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Britain</td>
<td>€482m</td>
<td>€432m</td>
<td>52% (49%)</td>
</tr>
<tr>
<td>Continental Europe</td>
<td>€568m</td>
<td>€488m</td>
<td>44% (43%)</td>
</tr>
<tr>
<td>North America</td>
<td>€548m</td>
<td>€369m</td>
<td>58% (56%)</td>
</tr>
<tr>
<td>Rest of World</td>
<td>€124m</td>
<td>€62m</td>
<td>29% (21%)</td>
</tr>
<tr>
<td>Total</td>
<td>€1,722m</td>
<td>€1,351m</td>
<td>48% (45%)</td>
</tr>
</tbody>
</table>

Source: Fáilte Ireland

The absolute level of income from overseas tourism to the West has increased by 27% in current terms since 2010 to €1,722m in 2014. More significantly the share of total expenditure spent in the West increased to 48%, from a 45% share over the same period. The West’s share of expenditure from each of the main source markets has increased compared to 2010. The total number of bednights in the West is estimated at 26.3 million or 47% of all bednights spent in the country by overseas visitors in 2014.

Source: Fáilte Ireland
Overseas demand for holidays in the West

The volume of holiday visits to the West is on the increase. The south west, the most popular region, attracts close to 40% of all holiday visitors to the country, followed by Galway/Mayo attracting almost one in three (31%). The Shannon region is capturing a 20% share while about 10% of holiday visitors to the country make it to the North West.

Perhaps a more telling barometer of demand is the number of bednights spent by overseas holiday visitors along the western seaboard. More than half (56%) of the bednights spent in the country by overseas holiday visitors are spent along the western seaboard. An estimated 12.7m bednights were spent in 2014, with an average 10% increase in demand in each of the past two years.

- Continental Europe is the top source of demand generating just over 5.3m bednights in 2014, a 27% increase in demand from three years earlier, with a 42% share of the demand.
- North American demand reached 3.6m bednights in 2014, generating over 1m of the additional bednights compared to 2011.
- The British market was the source of just under 3m bednights from holiday visitors in 2014, up 4% on 2011.

Overseas holiday bednights in the West 2014

<table>
<thead>
<tr>
<th>Source Markets</th>
<th>Where the bednights were spent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Britain</td>
<td>North West 1,174,000 (9%)</td>
</tr>
<tr>
<td>North America</td>
<td>Galway/Mayo 3,517,000 (28%)</td>
</tr>
<tr>
<td>Cont. Europe</td>
<td>Cork/Kerry 6,020,000 (47%)</td>
</tr>
<tr>
<td>RoW</td>
<td>Shannon/Clare/Lim. 1,976,000 (16%)</td>
</tr>
</tbody>
</table>

Source: Fáilte Ireland
How holiday visitors to the western seaboard arrived in Ireland (2014)

Almost 7 out of every 10 overseas holiday visitors to the West currently arrive in Ireland via an east coast gateway and account for 60% of overseas holiday bednights. Overall 85% of holidaymakers to the western seaboard arrive by air, generating 77% of bednights, whereas 15% arrive by ferry and account for 23% of bednights.

% holiday visitors through each gateway (% holiday bednights)

Source: Fáilte Ireland, Survey of Travellers
Note: Data for Knock & Kerry airports not available as not currently covered by Fáilte Ireland’s Survey of Travellers

It is worth noting that:

- Holiday visitors arriving by ferry on average stay longer than those arriving by air.
- Holiday visitors arriving directly into airports outside of Dublin tend to stay longer in the West.
Tourism in the West – an engine for growth and jobs

Domestic tourism along the western seaboard

Almost three out of every five euro of expenditure by Irish people on domestic tourism ends up in the West.

Just over 2m holiday trips were made to the western seaboard in 2014, almost 60% of all domestic holiday or leisure trips, spending an estimated €528 million.

Over the past 5 years the West coast’s market share of domestic holiday trips and expenditure has slipped, which reflects the greater Dublin destination attracting an increasing share of domestic leisure demand, based largely on events and short breaks. The West experienced a sharper downfall as Irish people cut back more on long holidays (4 nights+) than on short breaks.

Cork/Kerry, while still the No.1 leisure destination for the domestic market with a 23% share of trips and a 25% share of bednights and expenditure, has seen its market share position slip over the past 4 years. However, Galway/Mayo has increased its volume share. Shannon region’s market share has been reasonably stable, while the North West has gained a percentage point share between 2010 and 2014.

Source: Fáilte Ireland
2015 the year so far – what the industry says³

- **Overseas demand:** 71% of respondents to the TTC August survey reported an increase in demand, with 14% reporting no change and 15% experiencing a drop in demand. This would suggest that while overall arrivals into the country are up 14% for the first 7 months, there are some businesses in the West yet to enjoy the benefit of this increase in overall demand.

- **Domestic demand:** Three out of five businesses (60%) along the western seaboard reported an increase, with one in five (20%) each reporting ‘no change’ or a drop in demand. The poor Irish summer weather was attributed by some as the reason for the softness in demand.

The strong consensus amongst respondents is that the improving economic conditions in the main source markets coupled with the advantage of strong US and UK currencies, are the principal drivers of the upsurge in demand this year. Other contributing factors for the improvement included improved competitiveness (including the reduced VAT rate); the promotion of the Wild Atlantic Way; investment in marketing by businesses; increased air services; and effective marketing by Tourism Ireland.

Based on available official data on tourism performance for the year to date it is likely that the West will report a continuation of market share gain of overseas demand. Annual tourism earnings from overseas tourists to the West could be up by close to 10% in 2015, injecting €1.9 billion into the regional economy. In addition, the recovery in the domestic economy is expected to be reflected in higher receipts from the Irish market.

³ Source: Survey of Stakeholders, August 2015
Diverse landscape and experiences, coupled with its people and tradition of hospitality, uniquely positions the West as the quintessential Ireland destination, delivering on the proven appeals and aspects of a satisfying Irish holiday.

A broadening of Ireland’s source markets and segments, together with more active and engaging experiences being sought by visitors, presents a specific opportunity. The West has the potential to capture an increasing share of the growing numbers of holiday visitors to Ireland, including the core segments of ‘social energisers’ and the ‘culturally curious’, with a particular edge in attracting the ‘great escapers’ and those visiting to pursue a specific interest. The appeals and experiences on offer in the West are capable of generating demand from new market segments.

Specific authentic ‘real Ireland’ experiences where the West has a competitive edge include:

- Coastal scenery & mountains
- Heritage and culture
- Outdoor activities and exploration
- Themed walks and cycle ways
- Maritime tourism
- Food and drink
- The Gaeltacht

The West is well positioned to attract a greater share of holiday visitors from the fastest growing source markets, namely continental Europe, North America and new emerging long haul markets, while maintaining its share of traffic from the British market. The West has the tourism infrastructure to cater to touring holidays as well as those seeking a more in-depth based holiday along the western seaboard.
Tourism in the West – an engine for growth and jobs

SUMMARY

The Wild Atlantic Way (WAW)

The development and marketing launch of the Wild Atlantic Way is generating significant favourable publicity for the western seaboard around the world. While it has been widely welcomed by stakeholders, its full potential has yet to be realised, with further investment critical to its ultimate success. The WAW is widely cited as a good example of what can be achieved with focused investment. The efforts of Fáilte Ireland in spearheading the implementation of the project are widely acknowledged.

Stakeholder evaluation of the Wild Atlantic Way

- Over four out of five rated the WAW as rising the profile of the area.
- Almost two thirds were of the view that the WAW was attracting more visitors to the area.
- Three out of five credited the WAW as a positive mechanism for mobilising business and community focus on innovation and tourism development.
- Just over half thought WAW could be a catalyst in the creation of new visitor experiences.

Source: Stakeholder Survey, TTC August 2015

A sample of the comments included the WAW providing ‘a positive sense of discovery’ and a ‘confidence and a feel good factor’ for businesses and communities. Several comments focused on the yet to be realised potential for unique visitor experiences particularly in the categories of ‘soft adventure, culture and heritage’.

Negative or cautionary comments centred on criticism of signage, the apparent exclusion of some local areas, villages and experiences, and the perception of poor linkages to regional airports. Concern was also expressed about sustainable transport options along the route, including cycle and walk ways. The need for continued capital investment and innovation was also expressed.

Overall the WAW received a very favourable report together with signalling some risks and identifying a number of issues which need to be addressed if the full potential is to be realised.

Industry confident for the future of tourism in the West

85% of stakeholders were positive about the future prospects for tourism, with less than one in ten having a negative outlook. Just over one in four are very confident for the future of the business, with a further almost three out of every five ‘cautiously optimistic’. Almost one in ten were ‘neutral’ in their assessment of future prospects.
New product opportunities

Stakeholders provided a range of suggestions in respect of new product or visitor experiences. The suggestions were very much in tune with the proven appeals of Ireland and the potential to deliver authentic Irish experiences to visitors from a range of source markets. These tended to coalesce around the following:

- **Realise the full tourism potential of the heritage and natural assets in the West which come under the Office of Public Works and the National Parks & Wildlife Service, in conjunction with Fáilte Ireland’s role in the development of tourism**

- **Coastal tourism: marinas, islands, boat trips, which have high appeal to visitors, particularly Europeans**

- **Food & craft beer – capitalise more on the market interest in local produce and dining experiences**

- **Pilgrim way network - the creation of a branded experience based on a series of ancient pilgrim ways in the country to meet a growing market demand for walking and reflective tourism**

- **Towns & villages – improving the presentation, information and events schedules**

- **Themed cycle and walk ways – creating appealing reasons to experience and explore, including the potential to develop a long distance branded walk similar to the Appalachian Trail**

- **WAW Passport to encourage longer stays and expenditure**

- **Tourist oriented public transport linking towns and visitor sites and attractions along the West**

- **Bogs interpreting the unique environment**

- **Greater use of inter-personal experiences – guiding, interpreting, demonstrating, re-enacting**

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**Key market potential for new and expanded visitor experiences in the west**

<table>
<thead>
<tr>
<th>Experiences</th>
<th>Culturally curious</th>
<th>Social energisers</th>
<th>Great escapers</th>
<th>Other</th>
<th>GB</th>
<th>CE</th>
<th>NAm</th>
<th>RoW</th>
<th>Domestic</th>
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</thead>
<tbody>
<tr>
<td>Heritage &amp; natural assets</td>
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<td>Marine</td>
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<tr>
<td>Food &amp; drink</td>
<td>✓</td>
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<td></td>
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<td>✓</td>
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<td>✓</td>
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</tr>
<tr>
<td>Pilgrim Way</td>
<td></td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Town &amp; villages</td>
<td>✓</td>
<td>✓</td>
<td></td>
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<td>✓</td>
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<tr>
<td>Cycle &amp; walkways</td>
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<td>✓</td>
<td>✓</td>
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</tbody>
</table>

Source: TTC analysis
CHALLENGES & ISSUES

The west faces a number of distinctive challenges in winning further share of the domestic and overseas demand for holidays in Ireland. These include:

Infrastructure deficit

The West suffers from a deficit of investment in essential infrastructure, including roads, telecommunications, water and sewerage. Government and European funding is urgently required in the West to bring roads, environmental and broadband infrastructure up to standard, according to business group Ibec. The group has branded infrastructure along the West “not fit for purpose” and warned that without investment, regional economic imbalance will continue. Access to high speed broadband is an essential requirement for businesses which, together with inadequate road infrastructure, are current obstacles to the growth of tourism in the West.

Investing for the future

Tourism needs more investment to cope with expected increases in visitor numbers. Attracting investment is vital to the sustainability of the tourism businesses. While demand is up, and in most instances yield is improving, investors need clarity around targets, earning potential and costs. A mismatch between short-termism of Government and its agencies and the investor’s horizon-bound perspective is a major challenge for the industry. The prioritisation of the use of state funds, and any investment incentives, need to be based on clear objectives based on tourist appeals with the potential to attract a significant increase in visitors and thereby deliver greater economic benefits in those areas with fewer alternative sources of employment and wealth creation. The stage of maturity of tourism varies along the Western Seaboard, with contrasting performance levels. For example Donegal, a county with one of the highest level of dependency on tourism in the country, currently attracts a relatively small share of the demand for the West.

A branded marketing positioning for the West

The creation of the WAW brand in recent times has given the West a distinctive and recognisable identity. To compete in an increasingly competitive world, the WAW brand proposition needs to be deepened and developed, consistent with the overall Ireland brand positioning. This would significantly heighten awareness of the destination and effectively communicate the range of authentic Irish experiences.

The WAW provides the basis for the evolution of the western seaboard from a tourism route to a broader tourism destination offering a range of experiences for touring and based visitors to Ireland.

Skills and labour

The growth of the tourism sector will require an adequate supply of skills and labour that can deliver quality service and exemplary hospitality. While the tourism industry relies on personal contact, the industry faces challenges due to the seasonality and fluctuation of demand, as well as a declining population base in the West. Industry sources warn of a shortage of qualified labour inhibiting future growth of the industry in the West.

Leadership, partnership and co-ordination

The West is currently disadvantaged in the lack of effective co-ordination to optimise the tourism roles and inputs of a wide range of public sector stakeholders. This would appear to have led to a diffuse strategic approach and inefficiencies in maximising the impact of capital and marketing investment. A whole-of-public sector approach is required, particularly as responsibility for the prime heritage and natural resources is spread across Government Departments, state agencies and commercial enterprises outside of tourism. They include the OPW, the National Parks & Wildlife Service, Coillte, the Heritage Council, together with the active engagement and support from Local Authorities, the Western Development Commission and Fáilte Ireland.

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4 Ibec’s West Regional Director John Brennan, Press Statement, September 2015
Air access

Airports located along the western seaboard, namely Cork, Kerry, Shannon, Knock and Donegal airports, serve overlapping catchment and destination areas. The share of capacity on offer into the West has been slipping as airlines increasingly concentrate services on the Dublin gateway. In addition, there have been several instances in recent years of new routes and services into the West leading to a degree of cannibalisation of already existing services, as airports competed for a limited market. As the evidence points to the greater value of tourists arriving directly into the West, the development of sustainable summer routes from the principal source markets in mainland Europe and securing an increase in transatlantic services into Shannon present a particular challenge for the tourism sector in the West.

The State’s enabling environment

The findings of the stakeholder survey provide a clear indication of the needs of businesses and how best the State can provide a business environment which will enable tourism enterprises in the West to grow.

<table>
<thead>
<tr>
<th>Government actions</th>
<th>Local Authority actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Taxation:</td>
<td>1. Reduce rates burden &amp; charges</td>
</tr>
<tr>
<td>• Maintain 9% VAT rate</td>
<td>2. Invest in and maintain facilitating infrastructure, e.g. country roads, cycle &amp; path ways, toilets, car &amp; coach parking and signposting.</td>
</tr>
<tr>
<td>• Reduce USC and employment taxes</td>
<td>3. Support / facilitation for festivals and events</td>
</tr>
<tr>
<td>• Support micro and SMEs</td>
<td>4. Reduce bureaucracy</td>
</tr>
<tr>
<td>2. Investment</td>
<td></td>
</tr>
<tr>
<td>• Infrastructure</td>
<td></td>
</tr>
<tr>
<td>• Greenways</td>
<td></td>
</tr>
<tr>
<td>• Airports</td>
<td></td>
</tr>
<tr>
<td>3. More joined up approach &amp; efficiency</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Fáilte Ireland actions</th>
<th>Tourism Ireland actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. WAW investment to complete</td>
<td>1. WAW – increase prominence in advertising/promotion</td>
</tr>
<tr>
<td>2. Encourage/support for investment/innovation</td>
<td>2. Sharper target marketing</td>
</tr>
<tr>
<td>3. Meet training needs of the industry</td>
<td>3. Provide more opportunities for trade engagement</td>
</tr>
<tr>
<td>4. Airport/ air services supports</td>
<td>4. Support air services into the West</td>
</tr>
<tr>
<td>5. Better co-ordination between state agencies</td>
<td>5. Set regional targets</td>
</tr>
<tr>
<td>6. Set regional targets</td>
<td></td>
</tr>
</tbody>
</table>

Source: Stakeholder Survey, TTC August 2015
Conclusion

Tourism along the Western Seaboard, as it wins share of a more buoyant international and domestic tourism demand, has the opportunity to attract increasing numbers of visitors. Tourism has the proven ability to generate greater economic activity in areas with few alternatives, creating more jobs and sustaining many communities.

The vision set out in this ITIC report foresees a prosperous future for tourism to the West based on the excellent strategic match of the natural and built appeals with market demand trends and projections. The key to success will be a collaborative approach in securing the necessary investment to deliver a world class visitor experience. However, the window of opportunity is not finite and demands a new alliance between the public, private and community stakeholders to realise the potential of tourism to sustain the Western Seaboard.

ITIC and TTC wish to acknowledge the assistance of Fáilte Ireland in providing latest research data, and the inputs from many industry executives who readily gave of their time to share their perspectives and experiences.
Charles Fort

All photographs courtesy of Raymond Fogarty