



Press Release : Oct 26, 2011

**Western Tourism Needs New Directions if downward trend is to be reversed,
says ITIC report**

9.8m bednights in 2010 down 37% from 15.1m in 1999

Greater innovation is urgently needed to attract more overseas visitors to the west of Ireland, if the trend of fewer holidaymakers going west is to be reversed. From Donegal to Cork, the hospitality industry needs to create more distinctive reasons to visit. This is a key finding of a new report - **New Directions for Tourism in the West** - from the Irish Tourist Industry Confederation (ITIC).

An estimated 9.8 million bednights were spent on the west coast by overseas holidaymakers in 2010. This compares with 15.1m in 1999, a 37% fall-off in demand. Last year just over half of all nights spent by holiday visitors to Ireland were spent along the west coast, down from a situation 10 years ago when two out of three bednights were spent west of the Shannon.

“This report is an important step in helping to reverse the decline in overseas holidaymakers to the west of Ireland”, according to ITIC Chairman John Healy. “Employment on the Western seaboard is most reliant on local and public services and the traditional sectors, particularly tourism.” He went on: “action needs to be taken now to reverse the overdependence that the west developed on the domestic market’

Tourism is critically important to the west, with the accommodation and food services sector is one of the main employers. Visitor expenditure indirectly supports retail, food producers, transport and other service sectors. Each of the four tourism regions – North West, West, Mid West and South West – have experienced a downturn in demand from all markets. The downturn was steepest in the Mid West and North West, who experienced the sharpest declines.

The past decade has seen very significant shifts in the motivations for travel in a fast changing consumer market. The pattern of where visitors go and what they do in Ireland has also changed. Today’s visitors seek more unique experiential and participative experiences. While the west of Ireland has in the past showcased the quintessential appeals of Ireland, the scenery of the Atlantic coast is no longer alone sufficient to attract overseas tourists. A

particular challenge is to differentiate the appeals and experiences along the western seaboard and to make them more compelling to attract overseas visitors.

The report points to the need to highlight more the range of adventure and activity holidays on offer together with 'dialling up' the appeals of local heritage, contemporary culture, eco/nature, music and the arts, the islands, the Gaeltacht, local food, and the range of festivals and sporting events.

The report, prepared by TTC- Tourism & Transport Consult International, analyses the loss of share of holidaymakers to Ireland going west, while an increasing number confine their visit to the capital and explore the west on a day trip from Dublin. To compensate for the limited number of 'must see' attractions along the western seaboard, the tourism industry faces the challenge of creating and delivering more distinctive and memorable experiences which exploit the natural, human and manmade assets of the area.

Notwithstanding the decline in overseas tourism to the western seaboard over the past decade, experience demonstrates that even in the most severe downturns, significant opportunities emerge at a local business level. The report looks specifically at the innovative Great Western Greenway; the success of Killarney in managing the environment in Ireland's oldest resort; and Galway's successful events strategy to create a 'happening place'.

Despite the extensive use of imagery featuring the west, the current marketing of Ireland as a holiday destination is not perceived as delivering results for the west. Industry stakeholders are calling for targeted campaigns to attract more German, French, American and British visitors to the west.

The report also concludes that the number of competing airports along the western seaboard has militated against the development of sustainable international air services to the west, a situation which needs to be urgently addressed by Government policy.

Delivering value for money is highlighted as a critical issue for future success as Ireland struggles to redress the perception abroad of Ireland being a high priced destination.

The organisation of tourism with upwards of 30 public and private sector organisations is highly fragmented and at least in need of greater coordination and reform to eliminate duplication and deliver more efficient use of scarce resources.

The key recommendations of the report include:

Strategically focussing on primary appeals to create demands

- ❖ Create new reasons to visit and deliver new experiences through more innovation and bundling of existing untapped assets to motivate a changed consumer market.

- ❖ Establish differential themed product zones or clusters along the western seaboard, linked to Fáilte Ireland's destination strategy.
- ❖ More animation of latent tourism assets is called for, including greater incidence of volunteerism, to bring the tourism experience alive.
- ❖ Place a particular focus on quality local foods including developing Tourist Taste Trails or 'Place on a plate' promotions.
- ❖ Boost participation in environmental schemes including Blue Flag and Tidy Towns and launch a new best tourism destination/experience award.
- ❖ Develop a calendar of hallmark events.
- ❖ Provide an expanded range of supports for R&D/innovation and incubation of new micro enterprises in tourism.
- ❖ Improve visitor information and interpretation at local level.

Getting the marketing right

- ❖ Refocus Ireland brand marketing to better communicate the unique appeals of the west. Research 'Atlantic Ireland' as a possible branding for the western seaboard.
- ❖ Adopt a more granular marketing strategy, with appropriate imagery and messaging in each of the priority target markets for the west (Germany, France, USA and Britain).
- ❖ Improve the co-ordination of marketing strategies, campaigns and resources between businesses, carriers, airports and state agencies.
- ❖ Produce better in-depth research on changing consumer behaviour and potential market opportunities.
- ❖ Establish sub-national targets, to include holiday visitors to the western seaboard.
- ❖ Launch a new 'online shop front' portal for the west, while businesses sharpen their online marketing capability
- ❖ Secure greater distribution through travel trade channels, including creating new group travel programmes.
- ❖ At local level, organise to exploit the diaspora, especially as part of *The Gathering* in 2013.

- ❖ Investigate the opportunity to boost the marketing of the west in selected markets by availing of Job Bridge, the Government's internship scheme.
- ❖ Secure more 'destination placement' for the western seaboard in movies, commercials and publicity in key overseas markets.

Improving accessibility to the west

- ❖ There is an urgent need for a national aviation policy to include Government's plan for a sustainable airport infrastructure along the western seaboard, taking into account regional economic development including tourism.
- ❖ Tourism interests and agencies to work with airports to develop a cohesive strategy for air route development, prioritising new low frequency seasonal services from France, Germany and the Netherlands into the west.
- ❖ Allocate marketing resources to promote existing services which have spare capacity.
- ❖ Lobby for the prioritisation of the upgrading of national roads of significant potential for tourism.
- ❖ Develop a branded and well interpreted 'Atlantic Coast Drive' to encourage exploration of points of scenic and cultural interest.
- ❖ Facilitate the licencing, operation and integrated ticketing of public transport services for tourists.
- ❖ Accelerate the delivery of broadband connectivity to the more remote areas of the western seaboard.

Ensuring the west stays competitive

- ❖ Initiate a tourism competitiveness monitor to track and compare prices across Ireland as a tool to inform business decisions.
- ❖ Industry to action the findings from Fáilte Ireland's Visitor Attitude Survey 2011, which for the first time will provide valuable information on consumers' assessment of the relative value for money of selected destinations in the west.

- ❖ Sectoral trade organisations to provide increased supports to members in re-engineering their cost, pricing and service levels in order to deliver an improved value for money offering to the consumer.

Making it happen

An annual '*Tourism Forum for the West*' to better coordinate planning and oversight of tourism development and marketing is proposed.

For further information contact

Michael Keane, Insight Consultants: 086-8244500

John Healy, Chairman, I.T.I.C.: 086-2397955

Eamonn McKeon, Chief Executive , I.T.I.C. : 087-2564630