Western Development Commission

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Western Development Commission

Blueprint for Tourism Development in the West

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Western Development Commission

An Action Plan for Rural Areas

western development commission

The Western Development Commission has responsibility for promoting and facilitating social and economic development in counties Donegal, Sligo, Leitrim, Roscommon, Galway, Mayo and Clare. Based at Ballaghaderreen, Co. Roscommon, the Western Development Commission is the only statutory body responsible for the integrated development of this region, and works closely with various government departments and agencies. It is also charged with operating the Western Investment Fund.

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Foreword

The uneven pattern of Ireland's recent economic growth was described in detail in the Western Development Commission (WDC) 1999 report **Blueprint for Success: A Development Plan for the West.** The range of policies and interventions that is necessary in various sectors to disperse growth to the Western Region was also set out. One of the key recommendations was the need to give high priority to supporting the competitiveness and expansion of the indigenous sectors in the region and, in particular, to target the development of tourism in rural areas.

Tourism growth in Ireland in recent years has been very significant. Over the last decade Dublin has established itself as a major city destination and has had the fastest rate of tourism growth. Indeed, the fact that the vast majority of overseas visitors enter Ireland via the east coast, whether by air or sea, exacerbates the imbalance between east and west. Although overall visitor numbers have grown in the seven western counties, it has been at a much slower rate and very unevenly dispersed, both in terms of volume and value. Visitors go mainly to the well-established tourism destinations in the south of the region or to the coastal resorts.

One of the main reasons given by tourists for visiting Ireland is the desire for experiences which are to be found in abundance in rural areas, yet relatively few travel to areas outside of the main centres and, even then, they are mostly passing through. In commissioning **Blueprint for Tourism Development in the West,** the WDC set out to identify how mainstream and 'niche' tourism can be more widely dispersed to rural areas outside of the mainstream destinations. The result is a detailed strategy for accelerating the spread of tourism growth to the rural areas in the seven western counties.

The report is based on extensive consultations with statutory agencies, representative bodies and community interests, as well as submissions from a wide range of community groups and individuals. An almost universal theme among all those consulted was the extensive fragmentation of the sector which is widely considered to have too many tourism bodies 'with lots of little brochures'. What emerges clearly also from the analysis in the report is that there is an urgent need for a framework that enables all of the bodies to work with one vision and one strategy for tourism development in the rural region. In this report, the WDC not only outlines that vision, but also specifies how it can be implemented and the specific actions which should be taken if it is to be realised.

This is an opportune time to recommend changes to policy and to implementation mechanisms for the dispersal of tourism growth. The White Paper on Rural Development **Ensuring the Future - A Strategy for Rural Development in Ireland** stated that "rural tourism must be integrated effectively into national tourism policy, particularly the national marketing effort, and into a regional approach to economic development". The need to encourage the spatial spread of tourism is acknowledged and provided for in the National Development Plan. The implementation of the NDP, as well as the imminence of an all Ireland tourism marketing body, is prompting an ongoing review of established tourism support structures. In this context, the Western Region could be used as a testing ground for a new approach.

The report was prepared for the WDC by Tourism Development International and their professionalism and expertise is deeply appreciated. The WDC wishes to give particular thanks to the chairperson and the members of the WDC's Tourism Sector Council who originally suggested that a blueprint for tourism be prepared. The Tourism Sector Council and staff from the three Regional Tourism Authorities have acted as focus groups during the period of the study, providing invaluable guidance in developing and refining the recommendations.

The WDC has already had extensive discussions with the Department of Tourism, Sport and Recreation and Bord Fáilte regarding the contents of this report. I have no doubt that they will provide the leadership and commitment necessary to realise the vision that it contains.

Sean Tighe
Chairperson

blueprint for tourism development in the west

the western development commission perspective

Introduction

During the 1990s, tourism growth in Ireland was spectacular, but growth in the West lagged behind other fast-growing areas in Ireland. The seven Western counties have a strong comparative advantage as tourism locations, but development to date has been quite concentrated in particular locations to the extent that congestion and sustainability are now emerging as issues in the peak season. Given the potential for growth in this indigenous industry, and the need to disperse such growth more widely than heretofore, the Western Development Commission (WDC) commissioned Tourism Development International (TDI) to draw up a rural tourism policy report for the seven county Western Region. The purpose of the report was to turn the spotlight on rural tourism - not as a small 'niche market' but as tourism in rural areas outside of the well-established destinations. The WDC, with responsibility for what is a predominantly rural region, wished to identify the barriers to the growth of tourism and to identify a policy for tourism development, along with strategies for implementation.

The final report is based on extensive research on the current state of rural tourism in the region and on the tourism market and its potential, as well as on widespread consultation with tourism providers, the travel trade, the various tourism bodies and other relevant agencies. The entire project was overseen by a Steering Committee set up by the WDC, which includes the key tourism interests in the region. The WDC has met with the senior officials in the Department of Tourism, Sport and Recreation and Bord Failte who have had the opportunity to study and respond to the WDC findings and recommendations. There is a broad measure of consensus among all the parties consulted in relation to the key findings and recommendations.

The WDC fully endorses TDI's findings and recommendations in what is the first comprehensive report on rural tourism in the West. In this section the WDC wishes to outline some of the key points in the report and highlight some of its main recommendations.

Recent Trends In Tourism

- Ireland experienced rapid tourism growth during the 1990s but this has not been evenly spread. Dublin had the fastest rate of growth.
- In the seven-county Western Region, growth rates, both in terms of volume and value, have also varied considerably.
- Co. Galway is the region's tourism capital, capturing almost half the bed nights of the entire region.
- Tourism is most developed in counties Galway and Clare. Almost two thirds of visits to fee paying attractions occur in these two counties.
- Accommodation clusters hug the coast in the Western Region. There are no major (250+ rooms) concentrations of accommodation away from the coast.
- The vast majority of visitors to the country enter Ireland via the east coast. Improving speedy access to the west is critical.
- Rural areas comprise over 80 per cent of both the landmass and the population of the Western Region. The revenue generated by tourism to rural areas in the Western Region was estimated at £219m in 1998.

Rural Tourism Issues

- There are both benefits and costs associated with rural tourism development. A strong commitment to sustainability is crucial so that tourism assets are conserved.
- Many overseas tour operators and tourists perceive all of Ireland as offering a rural tourism product so that they do not differentiate between regions.
- The development of new tourism product in rural areas has been driven mainly by the need for agricultural diversification.
- There is scope for improved performance of tourism in rural areas.
- There is a multiplicity of agencies involved in rural tourism and a general consensus that a more co-ordinated and strategic approach is essential.
- There is potential for tourism to make a greater economic contribution to the West's rural areas.

What The Market Tells Us

The key findings to emerge from TDI's market research clearly indicate the need for a strategic approach to rural tourism development, involving co-ordinated initiatives in the areas of product development, marketing, infrastructure, access and the organisation of tourism.

Key Findings from Market Research

Product	Marketing
• Environment is an essential element of the rural holiday experience and highly rated • Value for money variable • One third complain about poor weather • Investment required in weather independent facilities • Further investment required in: - Budget accommodation - Food standards and presentation - Evening entertainment. - Co-ordination of visitor activities • Litter problems need to be addressed	• Increased demand for rural tourism • Low awareness of West/North West • Relaxation, "getting away from it all" and sightseeing are main motivators • Middle-aged and senior couples predominate • Growth in direct bookings • Co-operative marketing approach required to make an impact on the market • Packaging essential

Infrastructure and Access	Organisation of Tourism
• Poor access considered West's main weakness • Demand for direct flights to the West • Need for improved signposting • Investment in roads by NRA and local authorities required	• Need to improve the co-ordination of activities for visitors • Need to improve packaging • Need for greater contact and improved business support from state agencies

At present, the northern coastal counties are less popular than the southern ones, but are certainly as scenically beautiful. The research indicates that extensive marketing is required, in addition to product development, to shift visitor patterns.

The inland rural areas cannot compete with the coast in terms of scenery. However, such areas can gain competitive advantage by offering;

- excellent visitor management and service;
- authenticity (lack of commercialisation);
- easy access (closer to Dublin);
- less congestion;
- tailor-made, special interest holidays.

It will always be very difficult to compete with the spectacular Atlantic coastline. Visitors cannot be made to go where they do not want to; extensive marketing will be required to change attitudes and stimulate demand.

Key Issues from Review and Consultation Process

- Widespread recognition that tourism performance is quite weak outside of the main tourism destinations.
- Need for a specific intervention to bring about change in less developed tourism areas.
- Need for long term vision and support mechanisms to deliver this change.
- Too many groups and agencies working independently of each other.
- Recognition of critical importance of delivering the National Development Plan infrastructure programme to underpin tourism development in the regions.

Strategic Approach

Three types of tourism zone are identified in the report - mainstream, potential mainstream and special interest.

In Zone 1 (Mainstream) the primary need is for effective visitor management, environmental protection and addressing human resource issues.

In Zone 2 (Potential Mainstream) priority should be given to filling product and accommodation gaps, and to increasing area appeal through marketing and strengthening networks, and to human resource issues.

In Zone 3 (Special Interest) priority should be given to developing special interest product excellence and network strengthening, including business support and training for quality.

Each of the zones need a different strategic response that is related to its current state of tourism development.

The Shannon corridor is a magnificent asset running from the north to the south of the region. It touches all of the inland regions and has significant unexploited potential.

A sustainable approach is essential, so that growth will take place in a gradual way, where relationships between tourists, landscape and the host communities will be in balance.

The economic viability of tourism enterprises is essential and this may not always have been given priority in product development. In many parts of the region the products necessary are in place, but co-ordination and links to the market are lacking. In short, the volume of business to less developed rural areas needs to be improved.

The qualities which attract tourists to the West of Ireland (as articulated in market research) are:

- unspoilt landscape;
- lack of over-commercialisation;
- genuine welcome of the people;
- sense of remoteness and peace

Access to the region (by air and road) must be made easier for the growing, international short-break market.

Strategic Priorities

Attracting more tourists to the West and achieving a more even distribution of tourism across the region requires a major shift in the approach to tourism development. The WDC believes that this will necessitate the adoption of distinct strategies, which can respond to the different needs of the three types of zones identified in the report.

There are seven essential elements in such an approach:

- The creation of a driving force for change which can give a clear strategic direction and deliver integration of support;
- A concerted effort to improve access to the West;
- A commitment to destination management and sustainability;
- The implementation of a well financed, co-ordinated marketing strategy encompassing the Western Region as a rural destination and the development of creative product packaging to meet customer needs;
- The maximisation of the product strengths of rural areas, while ensuring environmental and heritage conservation;
- Filling accommodation and other tourism infrastructure gaps so that visitors can experience a genuine quality product;
- Creating capacity to co-ordinate and deliver quality products and excellent customer care through appropriate support and the fostering of partnership between the various tourism interests.

Delivering Change

The WDC is convinced that significant dispersal of tourism growth to predominantly rural areas, such as the seven-county Western Region, requires a major shift in policy and practice. Present structures are not equipped to deal with the extent and scale of intervention required to address the particular needs of developing tourism in rural areas. Bord Fáilte, as a result of government policy, has largely shed its development role. Regional Tourism Authorities, which are under-resourced, are over-stretched in serving the needs of already congested areas and, while achieving commercial targets, cannot deliver the multiplicity of actions now required to disperse tourism development. Rural tourism co-operatives, where they exist, are also under-resourced and are heavily reliant on voluntary input. Other agencies (local authorities, LEADER companies, Teagasc, FÁS) are assisting rural tourism but there is no overall strategic plan, no overall goal. Yet there is clear evidence of a growing market for tourism in untapped rural areas, and recognition that the Western Region has the raw materials for that product in abundance.

Tourism dispersal to rural regions such as the seven western counties does not require the creation of any new body, but rather the co-ordinated intervention of a wide range of existing bodies. Such activity must be strategically driven from a tourism perspective, well funded and sustained over time. All of the relevant agencies of government must be involved and must combine to deliver what amounts to a major transformation in the approach to tourism development in rural areas.

Five Key Changes

1. Establishment of a **High Level Steering Group** made up of the Department of Tourism Sport and Recreation, Department of Agriculture, Food and Rural Development, WDC, Bord Fáilte, Regional Tourism Authorities, local authorities and other departments and government agencies with responsibility for aspects of tourism and the environment. **The Steering Group should be chaired by a senior manager in Bord Failte.**

2. Implementation of the new strategic approach would require the appointment of an Action Team consisting of:
   - **A Co-ordinator of Tourism Dispersal - West** who would work for Bord Failte and liase closely with the Western Development Commission.
   - **A Team of Tourism Development Officers funded through a partnership of tourism interests and public funding,** or redeployed from existing organisations.

3 **Additional funding** to assist Regional Tourism Authorities (in conjunction with the co-ordinator) to develop and disseminate best practice guidelines. This would ensure that **all bodies working at local, county and regional level could follow a common strategic direction** in relation to product development and promotion and the funding of such activities. The various sources of **tourism funding** coming into the region should be channelled in one clear strategic direction by agreement on guidelines between all the agencies.

4 Facilitate the zoning strategy by encouraging the establishment of working, private sector **rural tourism partnerships** in each of the zones, under the Regional Tourism Authorities, which should include major community-based initiatives and tourism entrepreneurs. Such partnerships would focus on delivering 'area-based tourism packages' in conjunction with the Tourism Development Officers and the Regional Tourism Authorities, as well as establishing strong links with the travel trade.

5 A **unit in the Department of Tourism Sport and Recreation** should be given overall responsibility for the delivery of the strategy in keeping with its overall objective of achieving dispersal of tourism to the regions.

How Will These Structures Work?

The Steering Group would work on bringing a common focus to structures at national, regional and county level, and on achieving relevant changes over a three to five year time span. Bord Failte, as the key state agency with responsibility for tourism dispersal in the context of the National Development Plan, should be the prime mover on this group which would oversee and monitor the implementation of the strategy.

The work of the **Tourism Development Officers** would be overseen initially by the Steering Group, but it is envisaged that they would work eventually under the aegis of either revamped Regional Tourism Authorities or County Development Boards, whichever appears most appropriate. From the beginning, the team would be expected to work closely with the Regional Tourism Authorities and other tourism interests, particularly LEADER companies and Irish Country Holidays.

The WDC recognises the key roles of the Department of Tourism, Sport and Recreation and Bord Failte in instituting such changes and in giving the necessary leadership to public and private interests at regional, county and local level. The Regional Tourism Authorities are also essential to the delivery of this strategy.

The WDC also recognises that the delivery of this strategy need not be confined to the seven county Western Region and so, where appropriate, can encompass the three designated tourism regions: Mid West, West and North West.

In addition to the five key recommendations detailed above, **Blueprint for Tourism Development in the West** contains **forty-three additional recommendations** for action in relation to marketing including the use of internet, destination management, product development, improvements in access to the Western Region, quality assurance and customer care.

The WDC will do its utmost to facilitate the delivery of this strategy. Through the Western Investment Fund (WIF), it will seek to invest in strategic initiatives that can accelerate the development of a co-ordinated tourism product in the region along the lines outlined in this strategy. In line with its statutory remit to foster and encourage the co-ordination of national, regional and local bodies, the WDC will strive to ensure that changes in policy for greater dispersal of tourism growth are implemented effectively, and that all the relevant parties are engaged in, and committed to, the implementation of these recommendations.

part one



the issues

1. Introduction and Background

1.1 Background and Objectives

The Western Development Commission (WDC) was established by statute in 1999 and has responsibility for promoting economic and social development in the seven Western counties of Donegal, Sligo, Leitrim, Roscommon, Mayo, Galway and Clare. The existing and potential contribution of an industry such as tourism, which is based on indigenous resources, to the economy of a region which is 80 per cent rural, is a key issue. Tourism in Ireland has been growing rapidly in recent years, but the benefits of this growth have not been evenly spread particularly to rural areas outside of the main 'honeypots' in the Western Region. The WDC therefore commissioned Tourism Development International to undertake a comprehensive study of rural tourism in the seven Western counties and to set out detailed recommendations for the future development of the sector. The WDC's objective in conducting this examination is to help to define future priorities for tourism development and marketing in rural areas of the Western Region.

The Terms of Reference for this study include identifying and documenting

- the role and contribution of tourism to the region
- the barriers to growth of rural tourism
- appropriate policies for the development of rural tourism together with implementation strategies
- identification of targets for growth and timescales for the development of rural tourism in the region.

This, in effect, involved the preparation of a Strategic Plan for Rural Tourism in the Western Region.

1.2 Methodology

The methodology proposed by Tourism Development International recognised the need for a market-led approach, and one that incorporated the views of rural communities, rural tourism providers and the relevant statutory agencies.
A four-stage approach to the study was agreed as outlined below (Fig. 1).

Fig. 1 Study Methodology

Stage I	Defining rural tourism
Stage II	The current situation - Review of existing rural tourism product and markets, assessment of future opportunities
Stage III	Policy formulation and vision
Stage IV	Rural tourism strategic plan

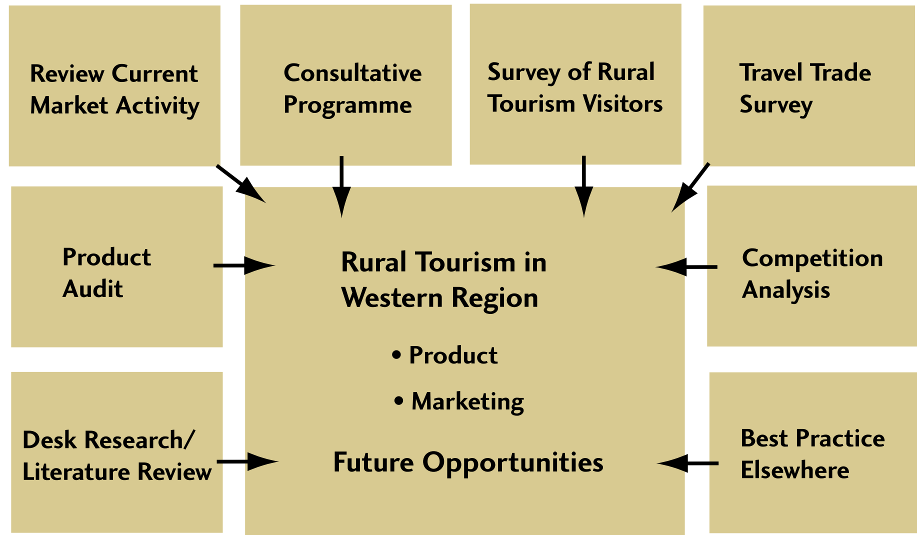
The study commenced in September 1999 and was completed in May 2000.

1.3 Research and Consultations

1.3.1 Approach

The core elements of the market research and consultation programme undertaken for the study are set out below:

Research and Consultations



Desk Research and Literature Review

A review of statistical data held by Bord Fáilte and Tourism Development International was undertaken, and relevant reports and literature (including a wide range of submissions to the WDC) were examined.

Product Audit

A detailed product audit of tourism facilities relevant to rural tourism in the Western Region was undertaken. This database is held in the WDC in both hard copy and Microsoft Access formats.

Review of Current Marketing Activity

A wide range of consultations and a detailed travel trade survey were undertaken in order to examine how rural tourism in the West of Ireland is marketed at present.

Consultations

Engagement with local interests and all responsible agencies was an essential part of the study process. The consultants travelled and met with rural tourism interests throughout the seven counties. In addition, many key players at local authority, regional and national level were consulted. A community tourism workshop was held at the Michael Coleman Centre, Gurteen, Co. Sligo in December 1999. The WDC invited submissions through regional press advertising and over thirty written submissions were received. (Those that were consulted are listed in Appendix 1).

Survey of Rural Tourism Customers

A detailed survey of users of the rural tourism product was undertaken in the autumn/winter of 1999. This involved a combination of postal, telephone and personal interviews.

Travel Trade Survey

In-depth interviews were conducted with
- Tour operators
- Travel writers
- Bord Fáilte overseas executives
- Carrier executives

This survey assisted an assessment of the product at present, and examined perceptions of its future potential.

Competition and Case Studies

Utilising the elements of the primary market research outlined above, and Tourism Development International's own resource of secondary data, case studies of best practice were put forward.

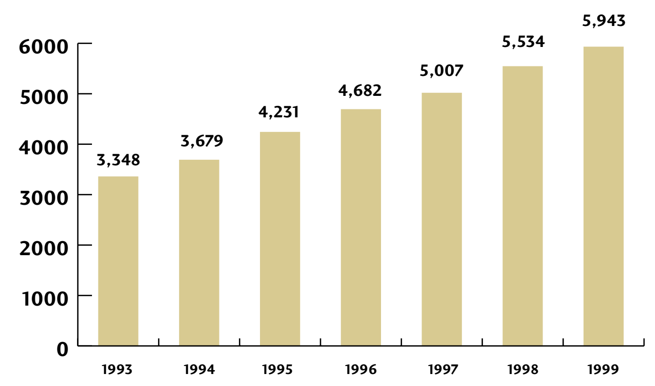
Drafting of Proposals

Detailed consultations took place with the WDC's Tourism Sector Council to examine and agree the way forward at various stages of the research.

2.1 Tourism in Ireland

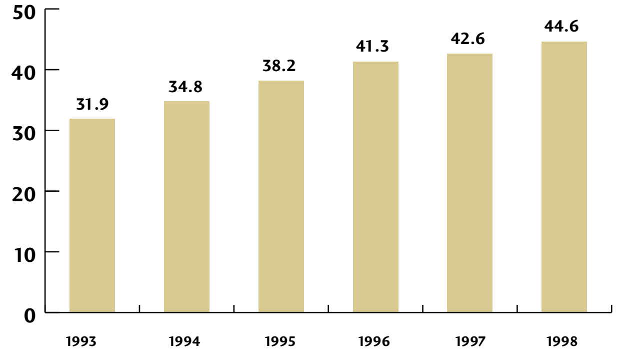
Tourism growth in Ireland was spectacular by any standards in the period 1993-99. Ireland is currently the fastest growing northern European destination, achieving a 6.4 % average annual growth rate, according to World Tourism Organisation arrivals figures for 1989-1998. Charts 2.1 and 2.2 below illustrate the growth in overseas tourists in terms of numbers and bednights. Chart 2.3 shows growth in foreign exchange earnings.

Chart 2.1 Overseas Tourist Numbers ('000)



Source: Bord Fáilte/CSO

Chart 2.2 Overseas Tourist Bednights (million)

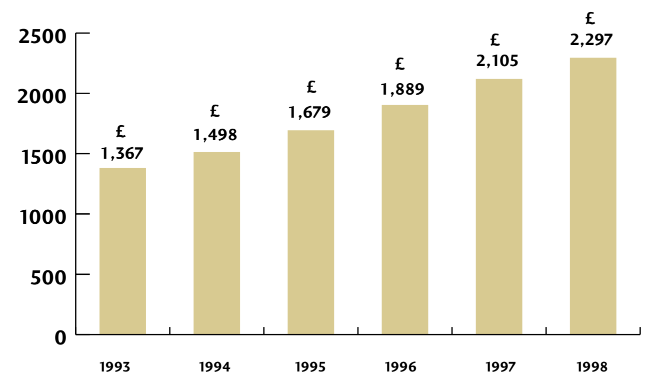


Source: Bord Fáilte/CSO

Between 1993 and 1999, the total number of overseas tourists visiting Ireland rose by 77% to 5.9 million.

In the six year period from 1993 to 1998, the number of bednights grew by 12.7 million (Chart 2.2). However, the slower rate of growth (40%), compared to that in overall tourist numbers, indicates that the average length of a visit declined.

Chart 2.3 Foreign Exchange Earnings(£ million)



Source: Bord Fáilte/CSO

In the 1993 to 1998 period, foreign exchange earnings, which include day trippers, visitors from Northern Ireland and carrier receipts, grew by 67%.

In summary, therefore, tourism volume, as measured by overseas bednights, grew by an average of 8% per annum, and tourism revenue, measured by foreign exchange earnings at constant prices, grew by an average of 13.4% p.a.

2.2 Future Tourism Forecasts

Bord Fáilte's Business Plan 1998 - 2003, on the basis of global forecasts, and the anticipated operational environment for Irish tourism, forecasts the likely number of tourists visiting Ireland by 2003 at 7.1 million, representing an average annual growth rate of 6% from 1997. Some slowing of growth rates can be expected thereafter, and assuming a drop in the average annual growth rate to 4%, this would indicate a total of 8 million tourists by 2006. No dramatic change is anticipated in the source markets for these tourists.

2.3 Tourism in the West of Ireland

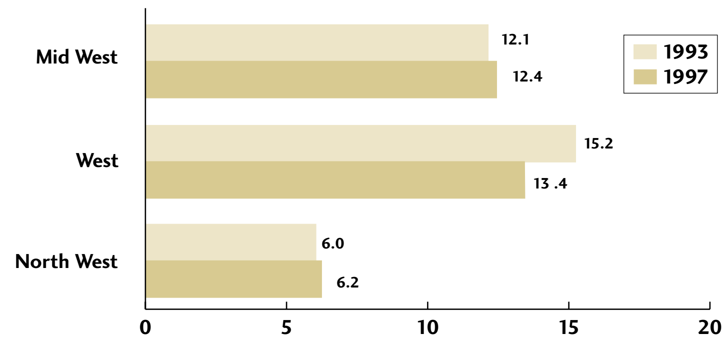
2.3.1 Western Development Commission Region

The WDC area covers the region west of the Shannon and County Donegal. Regional tourism statistics are not generally broken down on a basis which coincides exactly with the WDC's counties but the existing regional breakdown can provide a basis for comparison.

2.3.2. Regional Share

Charts 2.4 and 2.5 below show the comparisons of tourism in the West and North West in terms of overseas bednights between 1993 and 1997.

Chart 2.4 Overseas Bednights (%) in the West



Source : Bord Fáilte - Tourism Development International

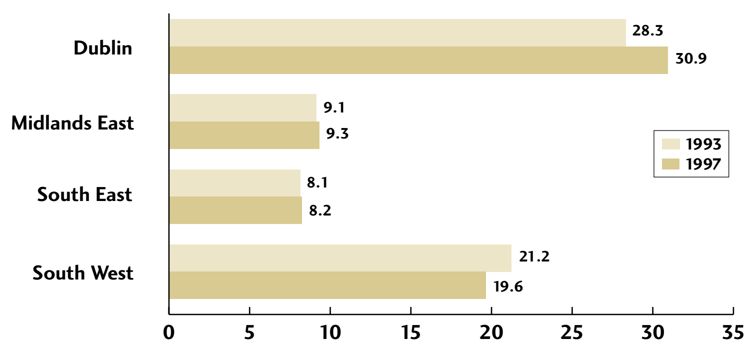
West Galway, Mayo, Roscommon

Mid West Clare, North Kerry, Limerick and part of Tipperary.

North West Donegal, Sligo Leitrim, Cavan and Monaghan.

This chart indicates that tourism is much stronger in the southern part of the region and that the West Region (Galway, Mayo, Roscommon) has lost market share. By contrast, Chart 2.5 shows the success of Dublin in establishing itself as a city tourism destination, helped by improved sea and air routes coupled with more competitive fares and the increase in global trend towards short holiday breaks. In contrast, the traditional holiday regions have not kept pace.

Chart 2.5 Overseas Bednights % in the Rest of the Country

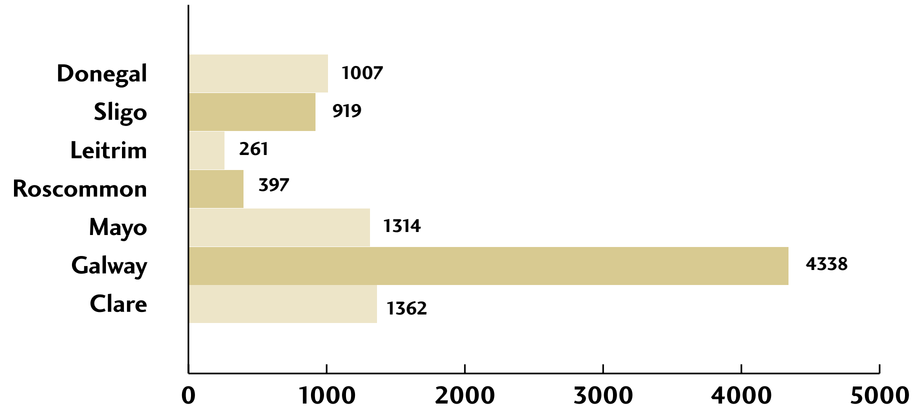


Source : Bord Fáilte - Tourism Development International

2.3.3 County Overseas Bednight Share

The seven western counties' share of overseas bednights (based on a three year average for the period 1996-1998) is as follows:

Chart 2.6 Overseas Bednights Average 1996-98 ('000)



Source : Bord Fáilte / Tourism Development International

This chart clearly shows the dominance of the region's tourism capital, Galway, where city break tourism, larger hotel units and commercial traffic boost occupancy.

2.3.4 Visitor Numbers and Expenditure

2.3.4.1 Overseas Visitors

Actual overseas visitor numbers for the seven western counties are as follows:

Table 2.1 Overseas Visitors - Number of Visits ('000)

	1993	1997	1998	Growth 93-98
Donegal	195	243	261	+ 34%
Sligo	172	220	226	+ 31%
Leitrim	45	49	50	+ 11%
Roscommon	54	56	52	- 4%
Mayo	240	298	288	+ 20%
Galway	678	939	877	+ 29%
Clare	391	540	570	+ 46%
WDC Region Total*	**N/a**	**1,414***	**1,495***	**N/a**

* Less than sum of individual totals because visitors visit more than one county.

Source: Bord Fáilte/Tourism Development International

The table clearly shows that, just as tourism growth across Ireland's regions is at widely differing rates, so there are large variations at a county level. The coastal counties show the strongest growth, with inland Leitrim showing slower (although positive) growth, and Roscommon showing a slight decline.

Revenues from overseas visitors to the seven counties show much more positive growth (Table 2.2).

Table 2.2 Overseas Visitors - Revenue generated (£million)

	1993	1997	1998	Growth 93-98
Donegal	29	39	42	+ 45%
Sligo	21	36	37	+ 76%
Leitrim	8	9	9	+ 12%
Roscommon	9	11	15	+ 67%
Mayo	35	45	50	+ 43%
Galway	107	165	172	+ 61%
Clare	46	69	52	+ 13%
WDC Region Total	**255**	**374**	**377**	**+48%**

Source: Bord Fáilte/Tourism Development International

There are substantial differences between growth rates for number of visits and for expenditure, but caution must be exercised in looking at statistical information from the Bord Fáilte Survey of Travellers at county level, from which these data are taken, owing to small sample sizes. Also, in some cases (e.g. Roscommon) growth is occurring from a very low base.

2.3.4.2 Domestic Visitors

Domestic tourism visitor numbers are not available at county level. However Tourism Development International has provided indicative estimates by assuming that domestic visitors follow a similar pattern of distribution to overseas visitors. These figures should, however, be treated with caution.

Table 2.3 Domestic and N.I. Visitors - Numbers of Tourist Visits ('000)

	1997	1998
Donegal	405	345
Sligo	373	298
Leitrim	85	66
Roscommon	53	68
Mayo	305	375
Galway	968	1,143
Clare	453	493
WDC Region Total	2,277	2,427

Source: Tourism Development International

2.3.4.3 Summary of Visitor Numbers

Tables 2.4 and 2.5 summarise tourism performance in the West for 1998.

Table 2.4 Western Region: Tourism Revenue 1998 (£million)

	Overseas	Domestic	Total
Donegal	42	32	74
Sligo	37	29	66
Leitrim	9	7	16
Roscommon	15	11	26
Mayo	50	36	86
Galway	172	123	295
Clare	52	31	83
Total	£377m	£269m	£646m

Source: Tourism Development International

Table 2.5 Western Region: Number of Tourist Visits 1998 ('000)

	Overseas	Domestic	Total
Donegal	261	345	606
Sligo	226	298	624
Leitrim	50	66	116
Roscommon	52	68	120
Mayo	288	375	663
Galway	877	1,143	2,020
Clare	570	493	1,063
Total	1,495	2,427	3,922

Source: Tourism Development International

2.3.5 Distribution of Tourism in the West

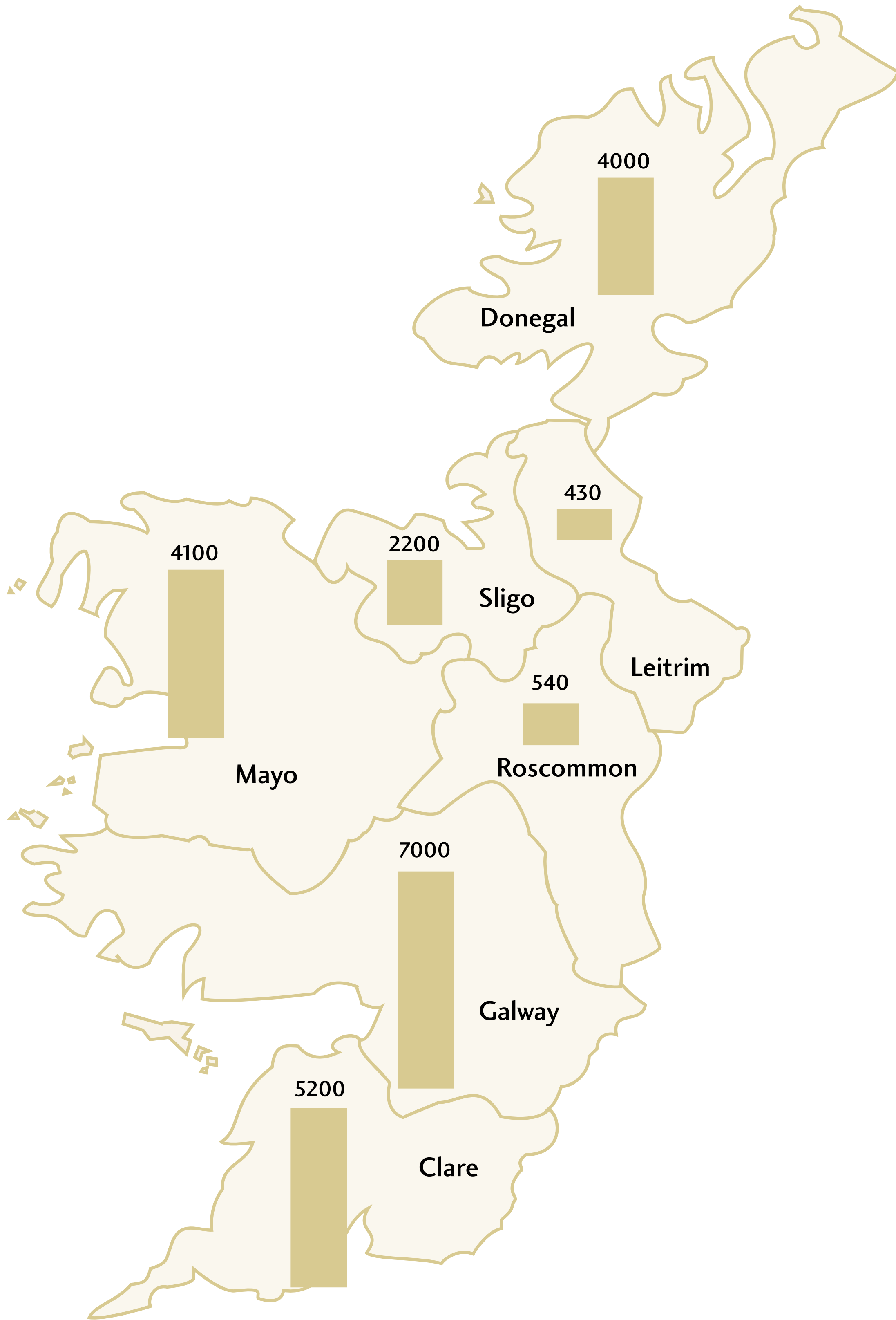
2.3.5.1 Accommodation Supply

Map 2.1 below shows the supply of approved accommodation in the West. In peak season, approved accommodation in popular holiday areas is supplemented by a substantial number of unapproved accommodation premises. Because much of this additional supply only comes on stream during busy periods it cannot be accurately quantified. However, in the opinion of regional tourism authority staff interviewed by Tourism Development International, it can at times double the available accommodation supply in the bed and breakfast sector in major tourism centres, especially during popular events. In addition, there is a growing use of "home stay" accommodation, especially for language school students. Despite this, it is the consultants' view that listings of Bord Fáilte approved accommodation provide the most accurate measure of the extent and reach of the tourism economy at local level.
The map below illustrates that in terms of current potential tourism earning power (through room supply), Galway is the region's tourism capital, followed by Clare. Mayo and Donegal have substantial accommodation banks, twice that of Sligo. The inland counties of Leitrim and Roscommon have weak accommodation bases.

The situation however, is not as simple as might at first appear. A more detailed analysis of room supply distribution shows that there are very high degrees of concentration, especially in counties Mayo and Donegal where over a quarter of available room supply is located in the seaside resorts of Westport and Bundoran. This is illustrated in Map 2.2

It is significant that virtually all of the major concentrations of accommodation in the West are within 25 miles of the sea.

Map 2.1 Approved Room Supply 1999



Map 2.2 Distribution of Tourism

2.3.5.2 Tourist Attractions

In Table 2.6 below combined attendance figures at fee paying visitor attractions in the seven western counties are shown.

Table 2.6 Combined Attraction Attendances 1995-1999 ('000)

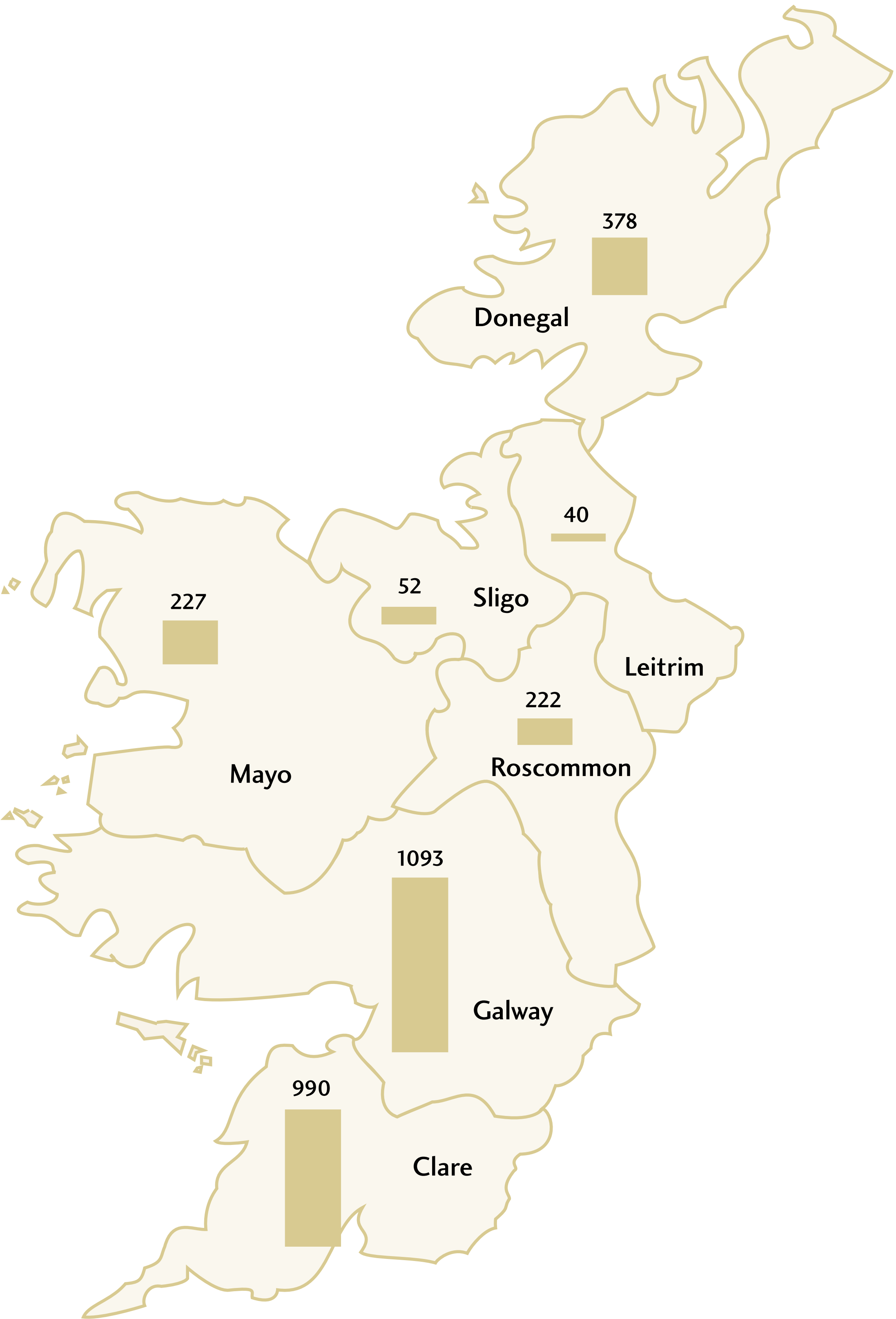
	1995	1997	1999	% Growth 95-99
Clare	617	762	990	60.5
Galway	472	559	1,093	131.7
Mayo	226	237	227	0.5
Roscommon	187	190	222	18.8
Leitrim	40	43	40	0.4
Sligo	39	40	52	33.9
Donegal	452	448	379	-16.2
TOTAL	2,033	2,279	3,004	47.7

Source : Tourism Development International

The data in this table also illustrate, the dramatic growth of Galway as the region's tourism capital. Clare has also seen strong growth, but has lost market share. There has been significant investment in attractions in these counties, most notably by the Belleek Pottery group at Galway Irish Crystal. The table also confirms the concentration of tourism in the southern (Galway/Clare) part of the region, with almost two-thirds of visits taking place in these two counties. While the figures do involve a degree of overlap (because the same visitor will visit more than one attraction), they nonetheless starkly illustrate the need for significant intervention if visitor distribution patterns are to be influenced.

Maps 2.3 shows the total attendance at fee-paying attractions in the Western Region and Map 2.4 shows the main fee paying visitor attractions in the region (those with more than 50,000 visitors). We can see that the largest concentrations of visitors occur in the south of the region (Galway and Clare). Sligo clearly lacks a major visitor attraction, and Donegal, whilst having many attractions, only has two with more than 50,000 visitors (Glenveigh National Park and Bundoran Waterworld). It should be noted that non-fee paying attractions, such as the highly visited Cliffs of Moher, are excluded.

Map 2.3 Combined Visitor Attraction Attendances 1999 (000's)



Map 2.4 Attractions Attendances 1998

2.3.6 Access

Access is critical to the development of tourism, regardless of location. The vast majority of tourists enter Ireland through Dublin and Table 2.7 serves to highlight the importance of the road network in distributing visitors around the country. There is clearly scope to increase throughput at Knock, City of Derry, Shannon and other airports. However, it is likely that the majority of visitors to the west will continue to access the region from the East coast.

Table 2.7 Passenger Movements Through Airports and Ports Serving the West of Ireland 1999

	1999
National Airports	**20,804,401**
Dublin	12,802,031
Belfast International	3,010,000
Shannon	2,190,522
Cork	1,501,848
Belfast City	1,300,000
Regional Airports	**831,650**
Knock	207,994
City of Derry	106,600
Donegal	23,143
Sligo	24,198
Others	469,715
Ports	**7,284,500**
Belfast	1,800,000
Dun Laoghaire	1,674,500
Rosslare	1,450,000
Dublin	1,350,000
Larne	800,000
Cork	210,000

Source: Aer-Rianta/CSO/Regional Airports/Port Authorities

2.3.7 Key Issues

- Ireland has experienced rapid tourism growth. Growth has been uneven, with Dublin seeing the fastest rate of growth.
- Growth rates are also uneven within the seven western counties, both in terms of volume and value.
- County Galway is the region’s tourism capital, capturing almost half the bednights for the entire region.
- Tourism is most developed in counties Galway and Clare. Almost two thirds of visits to fee paying attractions take place in these two counties.
- Accommodation clusters hug the coast. There are virtually no major (250+ rooms) concentrations of accommodation away from the coast.
- The vast majority of visitors to the county enter Ireland via the east coast. Improving speedy access to the west is critical. Investment in road and airport infrastructure is crucial.
- Dispersing tourism growth to rural areas means that such areas must be able to compete with the better established tourism destinations in terms of product and marketing.

CARTWHEELS - "COME TO LIFE ON A FARM" - case study one

Cartwheels is a farm tourism branding exercise developed in Devon and Cornwall.
The project was launched in November 1999

Brand criteria were developed following a programme of market research which highlighted:

- The need for uniqueness and product differentiation.
- The need for authenticity in the "farm" experience.

The core brand attributes for accommodation, which must be met, are:-

- Property must have land farmed by the operator attached to the main residence.
- Safe access must be given to areas where livestock is kept.
- Where food is provided it should include local dishes and produce.
- Business must be family run.
- Commitment to refer to other Cartwheel services.

Brand criteria are also laid down for farm restaurants, farm retail, farm attractions and caravan and camping sites on farm.

There are approximately 200 branded properties in Devon and Cornwall, mostly in the accommodation sector. The membership fee varies from £75-£600 depending on turnover. The initiative is part funded by the European Agricultural Guidance and Guarantee Fund and receives sponsorship from Cornish Mutual Insurance and BT.

Market research into farm tourism in the UK has shown that, while 46% of the holiday-taking public express an interest in a farm experience, only 5% actually take a farm holiday. The campaign is aimed at increasing this conversion.

The campaign is valued at £1.4 million and includes web based marketing (www.cartwheels.org.uk), brochure production, press advertising, PR and promotions.

Lessons

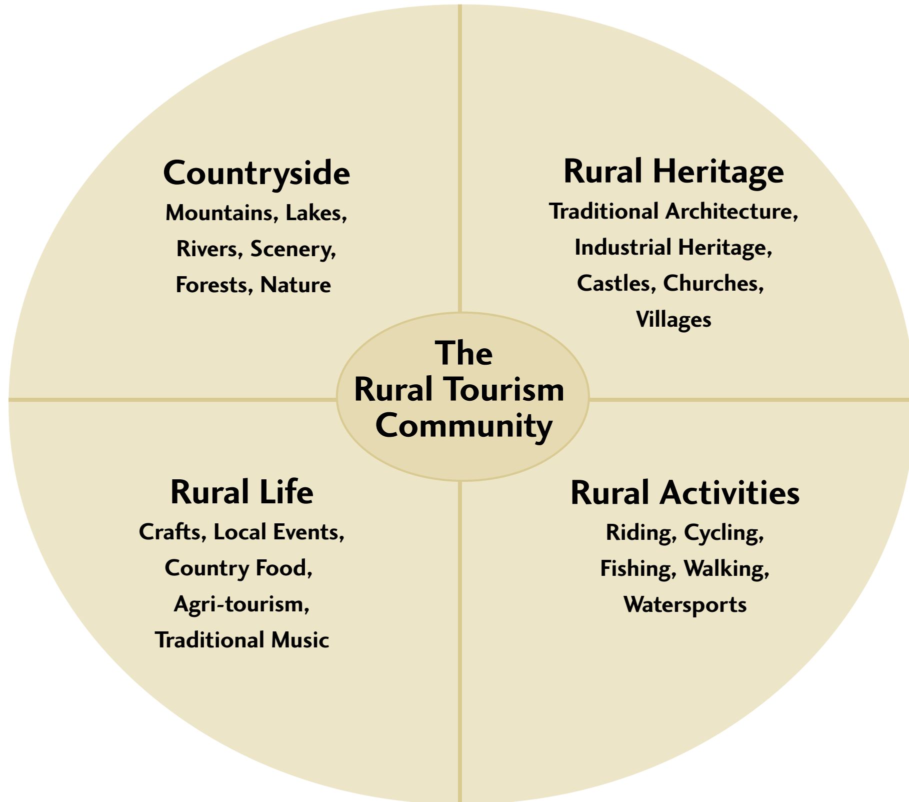
This case study illustrates that other destinations are also recognising the need for authenticity in offering a rural tourism product. It also shows that others recognise the opportunity to capitalise on a desire for rural experiences.

3. Rural Tourism

3.1 Introduction

One of the starting points for this study involved the construction of an acceptable definition of tourism in the context of the rural Western Region. Tourism Development International in its work internationally has conceptualised rural tourism as involving the various elements in Fig. 3.1

Fig. 3.1 The Rural Tourism Concept



Rural tourism is seen as being about inviting visitors to enjoy rural space. There are many specialist segments in the rural space - long distance walkers, people on nationwide cycle tours, competitive anglers, people on luxury golf holidays, people on coach tours of Ireland stopping off at famous ancient monuments. While all will make a contribution to the rural economy, they are not always classified as "rural tourism customers".

A workshop was held with the WDC's Tourism Sector Council, which acted as a steering group for the study, to examine the issue of definition. It was agreed that rural tourism should be defined at a broad level for the purposes of this study. The following definition was agreed and has been applied throughout the study process.

Rural tourism is engaged in by tourists seeking rural peace; it is tourism away from the mainstream, away from areas of intensive tourism activity. It is engaged in by visitors who wish to interact with the rural environment and the host community in a meaningful and authentic way.

3.2 Benefits and Costs of Rural Tourism

3.2.1 Introduction

In determining an appropriate strategy for dispersal of tourism growth to rural areas, it is important that the benefits and costs associated with this sector are taken into account. These are briefly summarised here.

3.2.2 Benefits

Economic

- New jobs may be created in tourism related businesses.
- Existing employment opportunities in services, such as transport, hospitality or medical care are sustained.
- The local economy becomes diversified.
- Existing businesses and services are supported.
- New businesses may be attracted to the area, further diversifying and strengthening the local economy.

Social

- Maintenance and support of local services, such as public transport and health care.
- New facilities and attractions, such as cultural or entertainment facilities.
- Increased social contact in more isolated communities and opportunities for cultural exchange.
- The development and/or preservation of a greater sense of community.
- Greater awareness and the revitalisation of local customs, crafts and cultural identities.

Environmental

- Provision of both the financial resources and the stimulus for the conservation, protection and improvement of the natural rural environment.
- Support for the preservation and improvement of the historic built environment, including country houses, gardens and parklands.
- Environmental improvements in rural towns and villages, such as litter disposal, traffic regulation and general improvements to buildings.

3.2.3 Costs

Economic

- Increased demand for and cost of public services such as refuse collection and medical services.
- Cost of providing attractions and general infrastructural improvements.
- May create jobs which are part-time or seasonal. In addition local people may neither wish nor possess the relevant skills to respond to employment opportunities offered by tourism with the result that many tourism-related businesses may be run by 'outsiders'.
- Frequently leads to increases in the price of land, property, goods and services.
- May result in local communities becoming over-dependent on a single industry.

Social

- Congestion and crowding which impinges on the day to day life and privacy of local residents.
- A reduction in local services, such as the replacement of traditional shops with restaurants or souvenir shops.
- The introduction of new ideas, styles and behavioural modes which challenge traditional culture and values.
- Increases in crime and other anti-social behaviour sometimes occur.
- Pressures on housing availability and conflict between locals and incoming temporary or permanent residents.
- The economy can become highly seasonal as holiday homes often lie empty in the winter.

Environmental

- Possible damage to both the natural and man-made environment through increased usage of fragile assets.
- Increased pollution in rural areas through littering or through developments which are inappropriate or intrude upon the rural setting.
- Increased pressure on sewage facilities.
- Increased traffic congestion.

3.3 The Need for a Sustainable Approach

Rural tourism is inextricably linked to the resource upon which it depends and as such there is a necessity for an integrated and sustainable approach to development. A sustainable approach to tourism development seeks to reconcile tensions between the people and environment of the host areas and the needs of visitors and the tourism industry so as to minimise environmental and cultural damage, optimise visitor satisfaction, and maximise long term economic growth for the region. The rural environment is fragile and can be either changed or damaged by rapid changes of any sort; tourism is a powerful agent for change. The case for a sustainable approach to the development of rural tourism is therefore a very strong one. The need for an approach which will enhance, rather than degrade, the environment is fundamental to the thinking of the WDC.

The WDC wishes to encourage tourism which will:

- Sustain the culture and character of host communities and actively involve their beneficial participation.
- Sustain landscape and habitats.
- Sustain the rural economy.
- Sustain a tourism industry which will be viable in the long-term and this in turn means the promotion of successful and satisfying holiday experiences.
- Develop sufficient understanding, leadership and vision amongst the decision-makers in an area to ensure that they realise the dangers of over-reliance on tourism, and continue to work toward a balanced and diversified rural economy.

In order to put the ideals of sustainability into practice, a number of key principles regarding carrying capacity, resource and product life-cycles, renewability, and responsible management must be applied. This will require detailed planning at local level as rural tourism is developed in the region.

3.4 Rural Tourism in Ireland

3.4.1 Image

From the point of view of the market, Ireland has been (until the development of Dublin as a city break destination in the 1990s), primarily a rural tourism destination. The Irish product is seen as essentially rural, its strengths are the quality of the landscape and the warmth and friendliness of the people. Strangers have been welcomed and they have felt part of the community. This has been a key strength.

This is reflected in a survey of general tour operators undertaken by Tourism Development International in November 1999. The survey included both Ireland-based handling agents and overseas tour operators. Those surveyed were asked what their definition of rural tourism was, and whether they see continued demand for rural tourism products/holidays in Ireland.

The views of Irish based handling agents included the following:

"[Only a] very small niche specifically ask for a 'rural tourism holiday'"

"There is only a market for rural tourism holidays amongst people in the Northern European market - Switzerland, Scandinavia, Germany, France."

"Rural tourism is available anywhere in Ireland, it is a question of efficient packaging."

The views of tour operators overseas who sell Ireland were similar:

"Rural tourism puts in place a structure which will deliver the rural image that Ireland has overseas..."
"Rural tourism is the countryside product. Go-as-you-please farmhouses, horse drawn caravans, that sort of thing. Here in Switzerland there is some demand for it, but it is not a big demand."
"The Irish product is a rural tourism product. I do not understand your question - that is what Ireland offers."

The views of the travel trade reveal that the market may see all of Ireland as a rural tourism product. A rural experience can, in the eyes of the travel trade, be delivered anywhere.

3.4.2 Tourism Development in Rural Areas

3.4.2.1 Agri-tourism and Rural Tourism

The development of tourism in rural areas of Ireland over the past decade or so has been largely driven by the need to diversify the rural economy. Incentives for diversification range from grant support to farm families to support for area-based development initiatives such as LEADER and Partnership companies. Tourism has been seen as a potential additional income source for farm families and, in this context, the terms 'agri-tourism' and 'rural tourism' are often used to identify a tourism product which is offered in rural areas, away from mainstream tourism destinations. In the quest for diversification, some development has been "product" rather than "market" led. Inevitably this had led to disappointment when utilisation of the product by the market has not been as good as originally envisaged.

The need to market this new product has been recognised and a product marketing organisation, Irish Country Holidays, has been created in addition to new 'destinations' being launched at local level. These local destinations are marketed through rural tourism "co-operatives" (in some cases companies).

3.4.2.2 Rural Tourism Co-operatives

Rural tourism co-operatives grew out of a pilot project in 1988 and a national organisation (Irish Country Holidays) was established in 1990. In the Western Region, the following rural tourism co-operatives have been established: Inishowen, Co. Donegal; North Leitrim Glens; Moy Valley; Erris; Úna Bhán; Joyce Country; Corrib Country; Clare West (see Map 3.1)

A new group is under formation around Portumna. Not all of the groups are members of the Irish Country Holidays product marketing group.

During the course of this study the consultants met with representatives of all the rural tourism co-operatives in the west and considerable frustration was expressed by many of them as to a perceived lack of support from mainstream tourism channels[1]. Some felt that Regional Tourism Authorities in particular do not offer full backing, perhaps perceiving rural co-ops as competing for membership or encouraging business away from the current RTA membership base. Detailed information on the number of bednights each co-operative/member achieves has not been disclosed to the consultants, but it is clear that many groups are disappointed with performance. Some groups have decided to leave the rural tourism consortium and to "go it alone".

Our discussions with most rural tourism co-operatives have also revealed that the majority of their business is mainstream tourists passing through/in the area, as opposed to "rural tourism specialists". Location is clearly the critical factor for success. Consumers' desire to be on or close to the west coast is a very difficult pattern to overcome. The fact that much of this accommodation is not in an accessible location adds to the difficulty. Irish Country Holidays is aware of its inadequate funding in order to launch, brand and market effectively a rural tourism product.

A trade survey was undertaken in order to test the effectiveness of the different groups involved in offering a rural tourism holiday. Of twenty-five tour operators contacted, few had awareness of the individual Irish Country Holidays rural tourism co-operatives. Shannon Development, Bord Fáilte and Irish Farm Holidays are the three best known players. The various rural tourism co-operatives are not achieving market penetration. Limited marketing budgets are part of the reason for this.

[1] For a description of the support agencies for rural tourism, see following section

Table 3.1 below shows findings from the Trade Survey, relating to unprompted awareness of organisations involved in marketing rural tourism, and prompted awareness of those organisations with which tour operators can recall having dealings.

Table 3.1 Awareness/Experience of Organisations or Destinations Involved in Rural Tourism

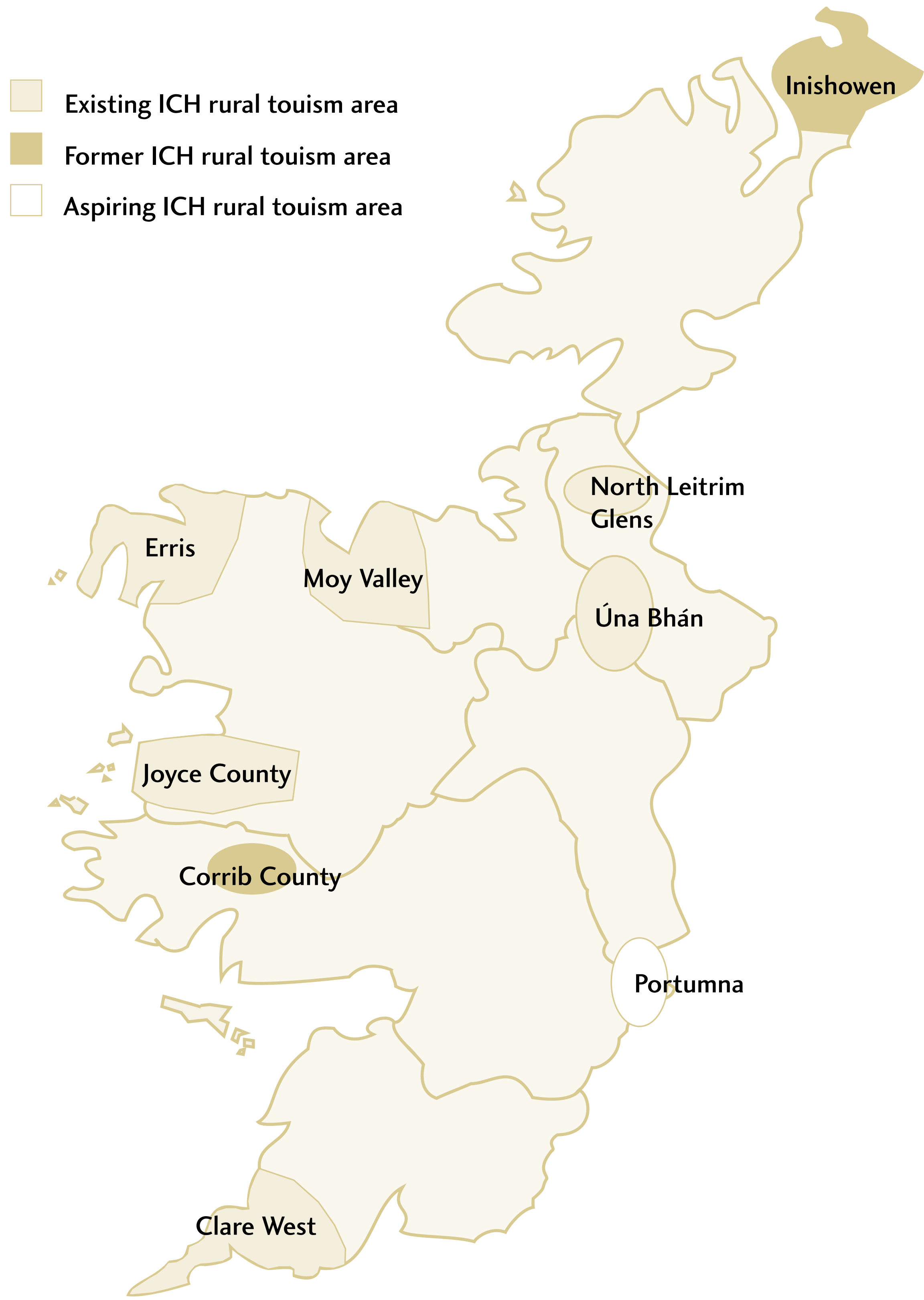
	Awareness (unprompted)	Dealings With (prompted)
Bord Fáilte	9	16
North West Tourism	4	12
Irish Farm Holidays	4	17
Shannon Development	2	19
Irish Country Holidays	-	13
Mayo Naturally	2	7
Ireland West Tourism	1	11
Corrib Country	1	3
Moy Valley Resources	-	2
Erris Tourism Holdings Ltd.	-	2
Inishmore Tourism Society Ltd.	-	5
Clare West Leader Ltd.	-	4
Úna Bhán Tourism Co-op	-	4
North Leitrim Glens	-	1

Source: Tourism Development International

This table shows that in a survey of the travel trade (which was specifically geared towards tour operators with knowledge of rural tourism), there is little awareness of the local rural tourism co-operatives. Even prompted awareness is low.

It is clear that those who have the major influence on the numbers and destination of tourists within Ireland are not linked to a specific rural tourism product as marketed by rural tourism co-operatives. This raises fundamental questions about the current approach to offering the rural tourism product to the market through local co-operatives, and indeed, as a special interest product "brand". By the same token it is necessary to question why support from the mainstream tourism industry structure (Regional Tourism Authorities) is seen as inadequate.

Map 3.1



3.4.2.3 Support Organisations

A multiplicity of agencies are involved in supporting rural tourism. Yet despite this, our consultations have shown that many rural tourism co-operatives feel isolated and insufficiently supported. The key agencies involved are as follows:

Bord Fáilte
Bord Fáilte as the national tourism agency has overall responsibility for long term planning of national goals. Strategically rural tourism is seen as a "special interest product". A marketing executive has responsibility for rural tourism in addition to a portfolio of other products. Bord Fáilte has assisted the Irish Country Holidays initiative and works well with it as a Product Marketing Group.

CERT
CERT is the agency with national responsibility for recruitment and training for the tourism industry. Given the current pressures on the labour market, it is clear that the industry is facing substantial training and recruitment needs. An effective programme for the provision of future training needs will be critical to the future of the industry.

Teagasc
Teagasc, the Agriculture and Food Development Authority, is the national body providing advisory, research and education and training services to the agricultural and food industry. As part of its rural development remit and in assisting farm families to develop complementary enterprises, it has a played strong role in a stimulating and assisting rural tourism.

Shannon Development
Shannon Development has responsibility for regional development (including tourism) in the Mid West. This includes County Clare. Its development plans recognise rural tourism possibilities in East and West Clare.

Regional Tourism Authorities (RTAs)
Two RTAs (Ireland West and North West Tourism) have responsibility for regional tourism development in six of the western counties. They have produced plans which emphasis the importance of, inter alia, sustainability and spreading the benefits of tourism. RTAs are partly funded by membership, and their membership is largely based in towns and resorts.

County Tourism Committees
County Tourism Committees are a sub-tier of Regional Tourism Authorities. They are relatively new organisations but are generally under-resourced and not strategically driven. In some counties, particularly where they have support from RTAs, they are working well at giving local identity to wider campaigns. Some have managed to access considerable funding for marketing initiatives (see case study on Marketing Sligo Forum).

Irish Country Holidays
As mentioned above, Irish Country Holidays is the national co-operative organisation for rural tourism co-operatives. It has had a number of changes in staff and direction in terms of marketing, but is seen as important to the future marketing of rural tourism.

Local Authorities
Local Authorities are increasing their role in tourism as its economic potential becomes ever more apparent. The local authority development planning process has been reviewed to give greater emphasis to co-ordination of initiatives. The seven local authorities in the region all have county tourism plans in one form or another. County Councils have a vital role in ensuring the protection of the environment from unsightly development through the planning process. They also have a crucial role in more general environmental protection. The new County Development Boards have the potential to play a significant part in the implementation of a coherent strategy for the dispersal of tourism growth to rural areas in the Western Region.

LEADER Groups
LEADER is an EU initiative through which local rural development action groups at sub-county level are funded to pursue innovative action projects. LEADER II is estimated to have invested over IR£30 million in the development of tourism product in rural areas. It has assisted many rural tourism co-operatives to undertake marketing and other initiatives.

Cross-Border Bodies
In the border counties (Donegal, Sligo, Leitrim) additional support is available from the International Fund for Ireland, the Special Fund for Peace and Reconciliation. Co-operation Ireland also supplies occasional support, but its remit is not restricted to the border counties.

3.5 Value and Volume of Rural Tourism

It is important to estimate the current economic contribution of rural tourism to the Western Region, in order to provide a baseline against which the effectiveness of future development can be assessed. To estimate the current volume and value of rural tourism in the region, we need first of all to calculate the pure holiday element of total visitors to the region. Based on data produced by Bord Fáilte from the Survey of Travellers, we estimate the number and value of pure holiday traffic to the seven western counties as outlined in Table 3.2.

Table 3.2 Western Region - Pure Holiday Makers Numbers ('000) 1998

	Overseas	Domestic	Total
Donegal	170	131	301
Sligo	147	113	260
Leitrim	32	25	57
Roscommon	36	33	69
Mayo	202	183	385
Galway	613	560	1,173
Clare	370	298	668
TOTAL	**1,005**	**860**	**1,864**

The estimates for domestic visitor numbers (including Northern Ireland) should be treated with caution. It is assumed that the purpose of the visit is the same as for regional domestic trips.

Table 3.3 Western Region - Pure Holiday Makers Expenditure (£ million) 1998

	Overseas	Domestic	Total
Donegal	27	12	39
Sligo	24	10	34
Leitrim	6	3	9
Roscommon	11	5	16
Mayo	35	18	53
Galway	120	60	180
Clare	34	18	52
TOTAL	**257**	**126**	**383**

To calculate the volume and value of rural tourism to the region, we have based our calculation on the proportion of approved accommodation stock in the rural space, against the county total. The following percentages have been applied.

Table 3.4 Western Region - Rural Accommodation

	Total Roomstock	Rural*	% Rural
Donegal	4,000	2,600	65
Sligo	2,200	660	30
Leitrim	430	430	100
Roscommon	540	540	100
Mayo	4,100	2,800	68
Galway	7,000	3,900	56
Clare	5,200	2,300	45
TOTAL	**23,470**	**13,230**	**56**

* Excludes towns with over 10,000 population and designated seaside resorts.

On this basis, the volume and value of rural tourism in the region is estimated to be as follows:

Table 3.5 Rural Tourism in the Western Region 1998

	Volume '000	Value £m
Donegal	196	25
Sligo	78	10
Leitrim	57	9
Roscommon	69	16
Mayo	262	36
Galway	659	101
Clare	301	122
TOTAL	**1,044**	**£219m**

These estimates indicate that tourism in the rural areas is a significant economic force, even in its present underdeveloped state. It currently represents 27% of total visitors to the Western Region (see Table 2.5), and 34% of total tourism revenue (see Table 2.4). Given that the seven counties are predominantly rural there would seem to be considerable scope to improve the performance of rural tourism in the region.

3.6 Consultation Process

As part of the process of undertaking this study, extensive emphasis was placed on consultation and engagement with rural tourism interests throughout the west of Ireland. Inputs were received through the following channels:

- Workshops with the study steering groups.
- Workshops with community interests.
- Consultations with statutory agencies and other representative organisations.
- Consultations with national organisations.
- Written submissions.

In addition, key strategic planning documents, including the National Development Plan, Regional Tourism Plans, County Development Plans and local plans, were consulted.

A number of key issues emerged from the consultation process.

3.7 Issues from the Consultation Process

Rural Tourism

There is a widespread recognition of the disappointing performance of rural tourism to date. Many reasons were put forward for this. These include:

- Dominance of mainstream destinations in Regional Tourism Authority membership - emphasis on supporting existing members rather than developing new areas.
- Competition for membership income between regional tourism authorities and county tourism co-operatives.
- Excessive reliance on voluntary sector.
- Lack of long term commitment to funding and support (including human resources).
- Weak accommodation base in some areas. Bed and breakfast businesses losing out to hotels in a changing market.
- Failure to communicate effectively with the market, and a feeling that rural tourism currently offers a product which is not sufficiently tailored to market needs.

Wider Strategic Issues

- It was felt that there is a general failure to plan tourism growth strategically.
- A need for long term support and new vision and leadership.
- Access is seen as a key constraint, and the opportunity to improve air access was particularly highlighted.
- Tourism information service is felt to be poor, with an overemphasis on a commercial rather than a service role. In particular winter closures of tourist offices was considered unhelpful.
- Signage within the region and from Dublin Airport to the region is considered poor.
- Sewage and water supply issues need to be addressed.
- The need to plan for tourism following the construction of a bypass, or the designation of a town for special tax designations.
- Human resources shortages at all levels.

Other Issues

Numerous proposals were submitted in relation to developments at local level. These ranged from brochure production to angling improvements and visitor attraction development. Many of these individual projects can be considered in the context of local area needs and the Western Development Fund.

3.8 National Development Plan

The National Development Plan, launched in late 1999, allocates £350 million to support tourism marketing, training and product development. The Plan specifically recognises the "problem of the spatial spread of tourism" and the existence of "significant untapped potential in many counties which to date are largely ignored by tourists". There is no separate tourism operational programme, but tourism will be allocated resources under four of the five national programmes. Ireland's first multi-annual Tourism Marketing Partnership has been allocated £150 million (£20 million per year for seven years) for destination and niche marketing measures of Ireland internationally.

Tourism will be supported under the Border, Midlands and West (BMW) Operational Programme with planned expenditure amounting to £59 million. This will be directed at

- developing major tourist attractions and clusters of attractions;
- developing special interest products for niche markets
- environmental measures to ensure sustainability
- marine tourism infrastructure and development of angling.

Rural tourism will also be supported under the Rural Development Measure.

Very significant investment in road infrastructure is proposed. The Dublin to Galway corridor (N4/N6) will be upgraded to motorway/improved dual carriageway status. Major improvements are planned for the N2 Dublin - Derry - Letterkenny), N4 (Kinnegad - Sligo), N5 (Castlebar-Longford), N26 (Ballina/Foxford) and N13-15 (Sligo - Donegal - Lifford - Letterkenny). Also the improvements to the Western Corridor (Rosslare - Limerick - Sligo) are critical to distribution of tourism from Rosslare and within the region.

3.9 Bord Fáilte Development Plan 2000-2006

This plan has yet to be published, but Tourism Development International understands that it is likely to include an emphasis on examining the carrying capacity of established regions and to encourage the development of other regions in order to manage tourism growth. Tourism numbers are expected to grow from six to eight million by 2006.

3.10 Sustainable Development - A Strategy for Ireland

Extensive consideration is given to tourism in this document which was published in 1997. The multi-sectoral nature of tourism is recognised, and the roles which the Department of the Environment, planning authorities, Bord Failte, Department of Tourism, Sport and Recreation, Department of Arts, Heritage, Gaeltacht & the Islands, Department of the Marine, CERT and others will take to bring about a more sustainable approach to tourism development are outlined.

Tourism's interactions with the environment are explored in detail and the study looks at the following areas in particular: land use; image and infrastructure supports; managing numbers; sensitive areas and scenic landscapes; seasonality; unsustainable leisure activities; impacts on biodiversity; pressures on the coastal zone; green housekeeping.

Overall, the document asserts that the carrying capacity of the environment must be given greater respect where tourism is concerned. Large scale tourism development may not, in certain cases, be desirable. In general it is better that tourism pressures be relieved by greater dispersion and a better seasonal profile. Bord Failte's 1994 definition of the 'optimal' number of tourists - the point beyond which it would not be possible "to enhance the welcome of additional tourists without making the community worse off as a result" is referred to, but it is pointed out that the 'optimal' number will change over time, depending on success or otherwise in achieving dispersal and addressing seasonality. If pressures on the environment continue to increase, then the optimal number of tourists may need to be reduced.

Tourism development will also be taken into consideration by the Department of the Environment as it prepares the National Spatial Strategy which will be ready by 2002.

3.11 Key Rural Tourism Issues

- There are both benefits and costs associated with rural tourism development.
- Given the fragility of the rural environment, developing a sustainable approach is critical.
- In general, the tourism product offered by Ireland is seen by the travel trade as rural tourism.
- To date, the development of new rural tourism product has been driven mainly by the need to diversify the rural economy and provide additional income for farm families.
- There is scope for improved performance of tourism in rural areas.
- There are a considerable number of agencies involved in supporting rural tourism but support from Regional Tourism Authorities, in particular, is considered weak.
- There is potential for tourism to make an increased economic contribution to the West's rural areas.
- Widespread recognition that rural tourism is under performing.
- Need for radical shift in thinking to bring about change.
- Need for long term vision and support mechanisms to deliver change.
- Recognition of critical importance of delivering the infrastructure commitments in the National Development Plan.

MARKETING SLIGO FORUM - case study two

Marketing Sligo Forum is a partnership marketing consortium which has launched a new brand image for Co. Sligo (Sligo Land of Heart's Desire) and is promoting it through an extended off-season advertising campaign in order to help address the under-performance of Sligo as a tourism destination.

The main activities of the initiative include:

- Brand identity
- Brochure (100,000 copies)
- Exhibitions
- Radio advertising
- Direct marketing
- Public relations (including CD ROM photo library)
- Familiarisation for the travel trade
- Market research

The Forum operates from the North West Tourism offices and is led by the private sector. It is an excellent example of multi-agency partnership, and partnership with the private sector. A total fund of £475,000 has been budgeted for and this is provided for as follows:

	£
Sligo County Council	20,000
Corporation of Sligo	20,000
Peace & Reconciliation Fund	220,000
Sligo LEADER	55,000
IFI Season Extension Scheme	100,000
Private Sector	60,000
	IR£475,000

Market research includes a commitment to benchmark performance of the marketing campaign by testing awareness of the county as a tourism destination through consumer surveys.

Lessons

This case study shows the opportunity which exists when agencies agree to work together to a common agenda, built around a credible and comprehensive plan of action.

4. What the Market Tells Us

4.1 Introduction

It is essential that any proposals for the development of rural tourism in the Western Region be underpinned by thorough and up-to date knowledge of the market. In this chapter we present the results of the programme of market research undertaken for this study. This research had four elements.

- Trade Survey
- Accommodation Survey
- Consumer Survey
- Domestic Market Focus Groups.

4.2 Trade Survey

Tourism Development International carried out a survey of the travel trade between 31st January and 7th February 2000. In total, twenty-two executives were interviewed. The sample comprised a cross section of professionals working in the travel trade. All those interviewed had extensive experience in promoting Ireland as a holiday destination.

Table 4.1 TDI Trade Survey - Sample Details

• Specialist Operators	16
• Bord Fáilte Executives	4
• Travel Writers	2
Total	22

4.2.1 Understanding the Market - Visitor Motivations & Potential Market Opportunities

The overwhelming consensus amongst travel trade executives was that demand for holidays in rural areas had increased over the last two to three years. Apart from Ireland, which is featured by all respondents, France, and to a lesser extent Britain and Italy, were identified as the main growth destinations. The perception of Ireland as a rural tourism destination and the growth in tourist numbers can be attributed to effective marketing at a national level.
The desire to "get away from it all" is identified as the main motivating factor underpinning the demand for rural holidays. The environment of the host destination is also considered an essential ingredient. Rural tourists have a strong desire to "get in touch" with nature - a pristine environment is therefore expected.

A minority of individuals considering a rural holiday are likely to seek an experience of farm life as part of the holiday.

In general, the source markets which are seen as having the greatest potential for rural tourism are Germany and Britain. Demand is also strong from North America, France and northern Europe, albeit at a lower level.

4.2.2 Strengths and Weaknesses of the Western Region

Ireland achieved a "satisfactory" rating as a destination for rural holidays with eight of the twenty-two executives rating Ireland as "very good" in this regard, while the remaining fourteen rated Ireland as "good". This latter rating can be interpreted as moderate at best.

In Table 4.2 below the strengths and weaknesses of the West as a rural tourism destination as revealed by the Trade Survey is shown. The natural unspoilt environment, and authenticity arising from a lack of tourist development are considered to be the West's primary strengths.

Table 4.2 Strengths and Weaknesses of the West of Ireland

Strengths	Responses
• Landscape - scenery - natural unspoilt environment	8
• Less developed (in tourism terms) compared to other parts of Ireland - authentic/lack of touristy culture/not false.	8
• Friendly people	4
• Facilities and infrastructure already exist	4
• Remoteness - off the beaten track	3
• Not well known	3
Weaknesses	**Responses**
• Accessibility	9
• Lack of awareness - not as well known as other areas	5
• Poor roads / infrastructure	4
• Marketing - lack of promotion	3
• The weather	3
• Growing commercialisation/exploitation	2
• No real weaknesses	4

The west and north west of Ireland are considered to be inaccessible by comparison with other parts of Ireland. This is considered to be the region's main weakness by the travel trade. The region's physical distance from the main source markets is compounded by inadequate infrastructure, with the poor standard of roads being cited as a particular problem. (Evidence from other Tourism Development International surveys in the West also indicates that signage in many areas is not of a sufficient standard to cater for the needs of visitors and that litter is a concern.)

The west and north west are not as well known as other areas (i.e. the Cork/Kerry or Shannon regions).

4.2.3 Rating of Rural Tourism Product

In order to further probe product strengths and weaknesses in the west of Ireland, the travel trade was asked to rate various aspects of the rural tourism product on a scale from very good to very poor (Table 4.3).

Table 4.3 Rating of Aspects of Rural Tourism Product in the Western Region of Ireland

	Very Good	Good	Fair	Poor	Very Poor	No Reply
Accommodation Quality	6	12	3	-	-	1
Accommodation Price	2	7	9	3	-	1
Food Quality	5	12	4	-	-	1
Food Price	1	9	10	1	-	1
Range of Activities Available	3	9	8	1	-	1
Organisation of Activities	2	9	6	3	-	2
Evening Entertainment	3	12	3	2	-	2
Visitor Attractions	2	7	10	1	1	1
The Environment	13	7	-	1	-	1
Visitor Information	4	12	4	1	-	1
Access	-	3	11	6	1	1
Overall Rating	3	12	6	-	-	1

Ratings fall into three broad categories. The environment of the Western Region is the only aspect of the product to have received a high satisfaction rating. This is reassuring given the importance of the environment as a key motivating factor for visitors considering a rural holiday.

Moderately satisfactory ratings were recorded in relation to accommodation quality, food quality, evening entertainment and visitor information; the results clearly indicate that scope exists for improvement in these aspects of the product.

The main areas of concern relate to the emergence of high prices (particularly in relation to food and accommodation), the poor range and lack of co-ordination of activities for visitors, lack of visitor attractions and, as previously indicated, access. These are the aspects of the product that need to be given priority in a development strategy.

The travel trade was asked for views as to the initiatives that would be required to increase the West's market share. These are detailed under three headings in Table 4.4

Table 4.4 Initiatives Required to Increase West of Ireland's Market Share

Product Development / Marketing	Access	Infrastructure / Environment
More marketing / promotions	Direct flights to west	Maintain natural environment /avoid over-development
Develop authentic rural products (e.g. farmhouses, working farms, sheep shearing)	Improve transport from airports	Improve signposting
Improve co-ordination of rural tourism activities	Improve rail and bus services	Develop walking routes/network
Avoid over-development	More competitive fares	

4.2.4 Key Conclusions from Trade Survey

Awareness of the west of Ireland and the north west is low by comparison with other parts of Ireland. A sustained and co-ordinated approach to marketing and product development will be required in order to make an impact on the marketplace.

Co-operative Marketing

The travel trade would ideally like one point of contact in the west of Ireland. Furthermore, by pooling marketing budgets, and by adopting a common brand, product providers will be able to make a greater impact on the market place.

Rural Holiday Packages

The co-ordination of various elements of the rural tourism product (i.e. accommodation and activities) into rural holiday packages, or product marketing, is also necessary in addition to mainstream destination marketing activity. Priority should be given to the development and promotion of holiday packages for walking, angling, equestrian activities and the islands.

P.R. and Publicity

Awareness of the west and north west can be raised through publicity and press coverage. Travel writers, journalists and film producers should be invited to the west in a co-ordinated programme of familiarisation visits.

Direct Marketing

To complement co-operative marketing activities, a programme of supports could be put in place to assist product providers in undertaking direct marketing activities (i.e. direct mail and Internet activities).

Product Development

Many of the raw ingredients of the rural tourism product are already in place. Packaged activity holidays could in part address the lack of co-ordination and poor access to products that currently exist. Other initiatives will be necessary, however, to cater for the needs of the independent visitor.

The demand for "authenticity" by the trade also extends to mainstream tourism products (e.g. visitor attractions) where there is a need for investment.

Access and Infrastructure

Inaccessibility has been identified by the trade as the main weakness of the West of Ireland as a holiday destination. Priority must be given to upgrading the road network to and within the region. At the same time, the need for improved signposting needs to be addressed.

The trade executives interviewed also indicated that there is a strong demand for direct flights into the west of Ireland, subject to schedules and an attractive fare structure.

4.3 Accommodation Survey

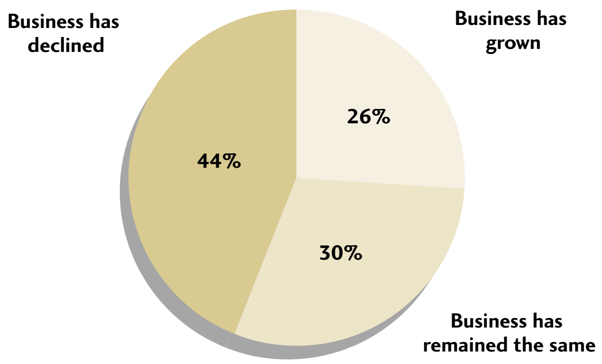
In order to establish an insight into product providers' current performance, and the marketing activities they undertake, Tourism Development International undertook a survey of 50 accommodation establishments in the west and north west. This was in addition to feedback from their customers.

The survey, which was conducted between January and February 2000 comprised interviews with hoteliers (9), B & B owners (30), guesthouse owners (8) and farmhouse owners (3). Interviews were spread across all seven counties, and were confined to rural areas only (i.e. all major urban areas were excluded for the purpose of this survey).

4.3.1 Recent Performance

On balance, accommodation providers reported a decline in business between 1999 and the previous year, 1998.

CHART 4.1 Performance of Tourism Business 1998-1999



Accommodation providers reporting a downturn in business attribute this to a number of factors. These include increased competition from urban areas and budget hotels, downturn in demand from the domestic market, and poor weather. The minority of owner/managers who had recorded an increase in business, attributed this pattern to a growth in repeat business. These operators also reported an increase in demand from the British market, and to a lesser extent, mainland Europe.

4.3.1.1 Occupancy

By comparison with established tourism destinations, occupancies in accommodation establishments in rural tourism destinations are low. Taking all types of establishments into account, average occupancy over a six month season (May to October inclusive) is estimated at 40% (20% over 12 months).

Some variations are evident in terms of different types of establishment as follows:

Occupancy* Rates in Rural Tourism Areas

• Hotels	46%
• Farmhouses	28%
• Guesthouses	44%
• B&Bs** (Town and Country Houses)	34%
Average Occupancy	**40%**

* Occupancy relates to 6 months

**Only B&Bs in rural areas were surveyed

The key characteristics of visitors to these rural accommodation establishments were as follows:

• Origin	Visitors attracted from all major markets
• Party Type	Couples predominate
• Age	Two categories important, middle age group (35-54) and seniors (55+)
• Repeat Potential	Average 36% repeat business

4.3.2 Owner/Managers' Understanding of Visitor Motivations

The results of this survey of accommodation providers reinforce the travel trade's view regarding the importance of the environment as a motivating factor. In overall terms, the type of holiday experience being sought by the customers of these rural establishments is largely passive in nature, with sightseeing and relaxation considered an essential ingredient. (Landscape is identified as the most impressive feature by 78% - See Table 4.6 overleaf).

Other factors, including hospitality and first hand experience of Irish entertainment, are also important.

Table 4.5 Type of Holiday Experience Being Sought by Tourists

General	%
Relaxation/peace and quiet	33
Sightseeing/places of interest	27
Scenery	27
Visiting relatives	18
Entertainment	16
Activity based holiday	11
Food	11
Traditional Music	9
Hospitality/friendly people	9

Specific Activities	%
Walks/mountain climbing	40
Golf	38
Angling	31
Coach Touring	18
Sightseeing	16
Cycling	9

Source: TDI Accommodation Providers Survey

Walking, golf and angling are the main active pursuits engaged in by visitors to these rural establishments.

Table 4.6 Most Impressive Features/Main Visitor Complaints

Most Impressive Features to Visitors	%
Landscape/scenery	78
Quietness/peace	24
Quiet beaches	35
Cleanliness	16
Archaeology/history	12
Atmosphere/craic in pubs	8
Good food/restaurants	6

Main Visitor Complaints	%
Weather	33
Bad roads/poor drivers	15
Restaurant prices	15
Poor access/airport too far away	9
Poor signage	9
Overcharging/poor service	9
Litter	6

Source: TDI Accommodation Providers Survey

Apart from poor weather (a factor which needs to be taken into account in the development of new tourism products), visitor complaints can be grouped under three main headings, as follows:

Inadequate Infrastructure	Bad roads Poor signage Poor access
Value for Money	Overcharging Poor customer care
Environmental Protection	Litter

4.3.3 Participation in Marketing Activities

Just over half (54%) of owner/managers interviewees claimed they undertake marketing for their own businesses. Apart from advertising in mainstream tourist publications and newspapers, over one third claim to be involved in direct marketing activities (i.e. Internet and direct mail).

Table 4.7 Type of Marketing Activities Undertaken by Accommodation Providers in Rural Areas

Type of Marketing Activities	%
Advertising in tourist iterature	33
Internet/Website	30
Local newspaper advertisement	30
National newspaper advertising	22
International advertising	19
Brochure distribution to tourist offices	7
Advertising with carriers	7
Direct mail to past customers	4

4.3.4 State Agency Support

Most accommodation providers had direct experience of state agencies. While two thirds of owners/managers were satisfied with the level of support received from state agencies, one in three expressed dissatisfaction. The main area of concern was lack of contact, although the need for improved marketing support (and assistance with bookings) was also identified.

Table 4.8 Concerns regarding State Agency Support

	%
Lack of contact	38
Improved marketing support	17
Assistance in obtaining bookings	14
Grants for upgrading	14
Need to control unregistered accommodation	7

4.4 Visitor Survey

Between December 1999 and February 2000 Tourism Development International undertook a consumer survey of 122 rural tourism customers.

Because the survey took place during the off season, a range of sources were used to achieve an acceptable and broad sample base. These sources were

- Irish Country Holidays database (postal/telephone)
- Accommodation bookings records in rural areas (telephone)
- Face to face interviews at visitor attractions.

4.4.1 Planning the Holiday

Consistent with information presented in the travel trade and accommodation surveys, touring and sightseeing (mentioned by 46% of visitors) was identified as the main reason for visiting rural west of Ireland. The desire to experience local culture and interact with local people was also mentioned, albeit at a lower level.

Table 4.9 Reasons for Visiting the West of Ireland

Reason	%
Touring/sightseeing	46
Visit friend/relative	21
Scenery/natural landscape	15
Peace and quiet	15
Experience culture/people	9
Walking	6
Painting	5
Genealogy/tracing roots	4

A majority of visitors booked their holiday one month prior to their arrival in Ireland, illustrating a high propensity for late booking.

Table 4.10 Accommodation Booking Details of Visitors Surveyed

Timing of Booking	%
One month before arrival	53
Two months before arrival	19
Three months before arrival	12
Four months before arrival	6
Five months before arrival	5
Six months before arrival	5

Method of Booking	%
Directly with accommodation	73
Through Irish Country Holidays	6
Through Bord Fáilte Overseas office	1
Through Bord Fáilte HQ /or R.T.O.	5
Through Internet	4
Other method	11

Three quarters of visitors interviewed booked their accommodation directly. Although only 4% used the Internet, this medium is likely to become increasingly important in the future.

4.4.2 Particular Likes and Dislikes

Once again, the pattern of particular likes and dislikes as identified by visitors to the rural west of Ireland is entirely consistent with survey results already presented.

The appeal of the West's scenic landscapes combined with exposure to its unique culture (in the form of interaction with local people, music, traditions, etc.), are identified as its most appealing aspects.

Table 4.11 Particular Likes and Dislikes

Likes	%
Beauty of landscape/scenery	50
Friendly people	46
Peace and quiet	18
Craic/atmosphere/pubs	14
Restaurants/food	13
Folk Music/culture	8
B.&B.s/accommodation	7
Beaches/coastline	6
Monuments/historic sites	5

Dislikes	%
Climate/poor weather	28
Poor road conditions	18
Too much litter	6
Poor food/restaurants	4
Few public telephones	4
Expensive	3
Roads not suitable for tour buses	3
Staff/poor customer care	2

A very high proportion of visitors expressed concern regarding the poor weather encountered when on holiday in the west. This would suggest that scope exists for the development of a small number of weather independent "flagship" tourism developments to help alleviate the impact of poor weather. (See strategic recommendations).

The other major concern related to the poor infrastructure encountered by visitors (most notably the roads).

A lack of value for money is also evident, albeit at a lower level, in the form of poor food quality, poor customer care and high prices.

4.4.3 Rating of Aspects of Holiday

Visitors were asked to rate various aspects of their holiday in the rural west of Ireland. High levels of customer satisfaction were recorded in relation to the rural tourism experience overall, and specifically in relation to accommodation, information, food and customer service. At the other end of the customer rating scale, moderate customer ratings, at best, were recorded for signposting, the roads and public transport (Table 4.12).

Table 4.12 Rating of Aspects of Holiday

Aspect of Holiday	Very Good %	Good %	Fair %	Poor/Very Poor %
Accommodation Quality	78	20	2	-
Accommodation Price	60	33	7	-
Food	70	21	6	3
Rural Tourism Experience	79	17	4	-
Customer Service	71	21	6	2
Visitor Information	64	26	9	1
Activities	1	87	11	1
Evening Entertainment	-	88	6	6
Signposting	-	59	24	7
Environment	-	88	8	4
Roads	-	75	10	15
Public Transport	-	51	24	25

Visitors who participated in different activities were also asked to rate these activities using the same five point scale (very good to very poor). The two dominant activities (each participated in by two thirds of visitors) were visiting attractions and walking. Activities are highly rated by those who participate (see Table 4.13).

Table 4.13 Participation in Activity/Rating of Activity

Visitor Participation	In Activity %	Ratings: Very Good %	Good %	Fair %	Poor /Very Poor %
Visiting Historic Attractions/Monuments	65	79	20	1	-
Walking/Short Walks	66	75	25	-	-
Walking (Long Distance)	16	83	17	-	-
Cultural Activities	14	90	6	2	2
Cycling	1	N/A	N/A	N/A	N/A
Other	12	81	15	2	2
No Reply	24	N/A	N/A	N/A	N/A

4.4.4 Suggested Improvements

Visitors to rural west of Ireland interviewed for this survey made a number of helpful suggestions on ways in which the west could be improved as a visitor destination. Their responses can be grouped under the headings of product, environment and infrastructure*.

- Product Improvements
  - Improve food standards
  - Greater variety of food/traditional Irish fare
  - More evening/traditional entertainment
  - Activities for children
  - Cheaper accommodation
  - Improve accommodation standards

- Environmental Improvements
  - Address problems of litter

- Infrastructural Improvements
  - Improve signposting/road signs
  - Improve road conditions
  - Improve public transport

* These visitor suggestions are presented in rank order.

4.5 Domestic Market Focus Groups

During the Holiday World fairs in Dublin and Belfast in January 2000 Tourism Development International conducted two focus groups with domestic holidaymakers. The purpose of the focus groups was to probe in detail attitudes towards rural tourism holidays and the West of Ireland.

4.5.1 Demand for Rural Holidays

Emerging trends seem to be as follows:

- Increasing demand for hotels - "pampering oneself", particularly for short breaks.
- Special "deals" or "packages" a strong incentive.
- Outdoor activities popular, particularly walking and golf.
- Families demand weather independent facilities, particularly when weather is bad.
- Optimum length of stay for short break would appear to be 2/3 days.
- High incidence of direct bookings; also use Bord Fáilte brochures, newspaper travel section, and commercial guide books.

4.5.2 Experience of Rural Holidays

When asked about prior experience of rural holidays in Ireland, it is clear that domestic visitors have:

- Extensive experience of rural holidays in Ireland - Cork, Kerry, Mayo, Clare, Galway and Donegal all mentioned.
- No spontaneous mention of Leitrim, Roscommon or Sligo.
- Desire for a different sort of experience, a feeling of peace and tranquillity, or an away from it all experience.
- Families tending to favour self-catering accommodation, for longer holidays; empty nesters favouring hotels, country homes or bed and breakfasts.

Negative aspects concerning rural holidays were:

- Poor weather - in this event, accommodation becomes very important.
- Over development - falseness of traditional accommodation with new cottages.
- Lack of facilities - problem for longer stay holiday.
- Poor value - overpricing for quality of food and service delivered.
- Difficulty in obtaining information on lesser known areas.

4.5.3 Awareness and Appeal of West/North West

As regards awareness and appeal of West/North West, findings are:

- Awareness of counties varies.
- Clare, Galway, Donegal have a lot to offer; Mayo to a lesser extent.
- Leitrim, Roscommon, Sligo had little appeal.
- Very low awareness and knowledge of Leitrim, Roscommon and Sligo - view that these counties are not marketed.
- Galway and Clare well known, with established beauty spots. Donegal also well known, but distance from Dublin a disadvantage.
- Clear distinction made between a "rural break", i.e. "getting away from it all", and "activity holiday", where the activity is organised and well developed.
- Most people who actively seek rural holidays are looking for scenery and different pace of life; pubs key ingredients for short break.
- Friendliness and good craic important.
- In addition to being in an area that does not have intensive tourism, people expect high standard of accommodation and some facilities.

- Also expect to get local information in advance of and during visit.
- Key issue concerning rural holidays in West/North West concerns perceived lack of marketing, particularly in relation to Sligo, Leitrim and Roscommon.

4.6 Conclusions

The market research reinforces the view that the west of Ireland has an excellent product for rural tourism. There are some issues of concern, principally poor infrastructure and the need for environmental protection, but it is clear that the basic product is in place and considered to be of a high standard.

The view that rural tourism customers are seeking a specific product with extensive community immersion is true of some visitors to rural areas, but not the majority of visitors or potential visitors. Landscape, environment and friendly people are the main draws for most visitors to Ireland. They want to see and do all of the usual holiday options.

The key findings to have emerged from the market research programme are summarised in Table 4.13. They clearly indicate that co-ordinated initiatives will be required in the areas of product development, marketing, infrastructure and access. The issue of how these initiatives are to be organised also needs to be addressed.

Table 4.13 Key Findings Arising from Market Research

Product	Marketing
• Environment is an essential element of the rural holiday experience.	• Increased demand for rural tourism. Low awareness of West/North West. Relaxation "getting away from it all" and sightseeing main motivators.
• Environment highly rated.	• Middle aged and senior couples predominate.
• Value for money variable.	• Growth in direct bookings.
• One third complain about poor weather. Investment required in weather independent facilities.	• Co-operative marketing approach required to make make impact on market.
• Further investment required in: - Budget accommodation - Food standard and presentation - Evening entertainment. - Co-ordination of visitor activities needed.	• Packaging.
• Litter problems need to be addressed	

Infrastructure and Access	Organisation of Tourism
• Poor access considered West's main weakness.	• Need to improve co-ordination of activities for visitors.
• Demand for direct flights to the west.	• Need to improve packaging
• Need for improved signposting.	• Need for greater contact and improved business support from state agencies.
• Investment in roads by NRA and local authorities required.	

The Finland Rural Tourism Policy Committee was established in 1996. It was given the following tasks by government:

- Draft national rural tourism policy
- Draft operational programme
- Undertake research
- Develop training initiative
- Develop central reservations system
- Marketing strategy to 2003
- Development policy to 2007
- Targets - increase occupancy to 50% and increase product utilisation from 10 weeks p.a. to 26 weeks p.a.

The product offered centres around the following key attributes:

- Spaciousness and tranquillity
- Scenery
- Rural culture
- Activities
  - Fishing
  - Gathering wild fruits
  - Seasonal events
  - Equestrian
  - Watersports
  - Textile skills
  - Forestry

An extensive training programme is given to tourism providers, leading to a professional degree. A rural tourism specific classification scheme has been established. It covers not just accommodation but food, ecological approach, etc.

Marketing themes are as follows:

- The bounty of nature
- Traditional handcrafts
- Traditional tastes
- In the Finnish summer
- Crunchy snow
- Idyllic farms
- Annual traditions
- Enjoyable trips

Marketing is undertaken centrally through Lomanengas - Finnish Country Holidays. This is a sister organisation of Irish Country Holidays. However it cannot really be compared to ICH because it has

- a thirty year track record
- fifteen permanent staff
- six regional agents covering standards and training.

Lessons

This case study illustrates the essential role of government in co-ordination and leadership in drawing together the diverse and scattered rural tourism product.

5.1 Present Position

5.1.1 Situation Assessment

The West of Ireland has significant further potential as a tourism destination. Whilst tourism is seen as an important component of the economy of the region, the main tourism centres hug the coast. There is a clear need for a well defined vision for rural tourism for the years ahead. The region contains many agencies for whom tourism is part of their role. A clearly defined and commonly held vision to guide marketing and product development activity is, in the view of the WDC, essential.

We have summarised the key opportunities and constraints for the development of rural tourism in the west in the form of a SWOT analysis (strengths, weaknesses, opportunities, threats).

5.1.2 Strengths

- Market research reveals a **growing market** for rural tourism.
- **Excellent product base** throughout the region.
- **Environment quality** very good - unspoilt, scenic region.
- Considerable **product development** has taken place across the region.
- Good levels of **satisfaction** apparent amongst consumers.
- **Regional airports** exist and are at present under-utilised.
- An **authentic**, not over developed, product is seen to exist.
- **Remoteness** can be used as a strength.
- The area has a **rural image**.

5.1.3 Weaknesses

- Widely perceived **lack of leadership** and vision at strategic level.
- **Accommodation shortages** in certain areas clearly evident.
- **Lack of awareness** of areas off the beaten track will be a challenge.
- **Limited success in selling the rural tourism concept** is apparent.
- **Weak support mechanisms** - regional tourism authorities not considered adequate.
- **Failure to market**, e.g. by many small scale operators.
- **Insufficient co-ordination** and packaging.
- **Accommodation** hugs the coast.
- The majority of **tourism** is in the south of the region (Galway and Clare).
- **Weather** unpredictability requires the provision of more indoor facilities.
- **Accessibility** is a problem, the downside of being remote.
- **Poor roads and signposting** are considerable negatives.
- **Pricing** is a concern.
- **Over development** (self catering schemes in particular).
- Perceived **lack of support** from agencies is a major concern of providers.

5.1.4 Opportunities

- **Market opportunity** - rural tourism is growing in popularity.
- Bord Fáilte recognise need to manage tourism growth - **spreading tourism** is part of this.
- **Packaging** - has not been successfully addressed - this is an opportunity.
- **Marketing** - has not been successfully addressed - this is an opportunity.
- Much of the product **is already there**.
- **Authentic experiences** are being sought.
- **Direct flights** to the West will help address the access issue.
- **Funding** is available to the region through EU and government sources.

5.1.5 Threats

- Continued marketing of traditional tourist **honeypots** will take place.
- Increasing **competition** throughout Europe.
- **Environmental deterioration** is a serious threat.
- **Growing commercialisation** is apparent in more developed areas.
- **Declining value for money** is a concern.
- **Labour/staff shortages** are increasingly a concern.

5.2 Key Strategic Issues

5.2.1 Direction

The need for **direction**, involving **leadership and intervention**, is clear if change is to be affected.

5.2.2 Marketing

Perhaps the greatest challenge of all for rural tourism development is marketing. Tourists cannot be forced to go where they do not want to go. It is necessary to build awareness of parts of Ireland not presently high in the visitors' and tour operators' minds. It is necessary then to provide motivation to visit, followed by easy buying mechanism. This is a long-term process involving considerable effort and expense over many years. There are no short cuts. Many bodies are currently involved in marketing rural tourism. Scope for consolidation is obvious.

5.2.3 Environment

Landscape Policy

The Heritage Council, Dúchas and the Department of the Environment have been involved in extensive reviews of landscape policy and the conservation of natural heritage. This is to be welcomed. The protection of the rural landscape from insensitive development is essential if the rural appeal of the Western Region is to be maintained. Pollution is also a key concern, at a large scale in relation to sewage and water supply; at a more local (but none the less widespread) level in relation to litter.

Local Authorities

Greater efforts also need to be made to preserve the vernacular style of rural towns and villages. County Councils have a key role in this regard. Signage, water treatment and waste management are critical areas of local authority responsibility, which if left unaddressed will cause severe damage to future tourism potential. The local authority integration role, through the new county development board process, is to be welcomed and is of considerable importance.

5.2.4 Accommodation

The accommodation bank varies considerably across the region. The bulk of it hugs the coast. This is a reflection of market demand. Intervention to increase supply in less developed parts of the region may be necessary, but only in circumstances where demand has been proven to be likely to exceed supply. Building new product in rural areas (a product led approach) has generally not succeeded in delivering growth beyond zones which accommodate overflow from existing popular areas. Accommodation can of course be built, but good occupancy will not follow unless market demand is generated. The bed and breakfast product, which forms the bulk of the region's accommodation supply, is coming under increasing pressure as market needs change.

5.2.5 Infrastructure

National Development Plan

A strong theme to emerge from the market research process is the need to address infrastructure weaknesses. While the Western Region's remoteness is part of its appeal, the visitor wishes to get to his/her destination quickly and efficiently. The National Development Plan lays considerable emphasis on infrastructural improvements, but the following issues are of particular concern for the West.

Airport Policy

- The West of Ireland is not accessible from Dublin airport, the main entry point to Ireland for air travellers.
- The West has a good network of regional airports (some requiring further investment), and these are not served by a convenient or sufficiently regular feeder service.
- Shannon Airport is a major asset to the region.
- The challenge for smaller regional airports is route viability, and policy/subsidy intervention is required to make them more attractive to potential airline charter users.
- Aggressive targeted marketing of regional airports is required.

Rail

All counties in the region have a rail service, with the exception of the county most remote from Dublin, Donegal. There is a rail link to Derry, but this is not an efficient means of travel and is relatively little used. There is potential to make greater use of the railway network in terms of spreading visitor numbers.

Roads

Significant improvements are being made to the road network in the west, but it will clearly require continued investment as pointed out in earlier WDC Blueprint Reports. Traffic management in parts of Clare and Connemara during peak season is required, in addition to the continued upgrading of both primary and secondary roads. Preservation of the essentially rural character of the countryside is also vital however, and road design must be more sensitive to this in the future.

Signposting

Effective signposting has been called for in numerous tourism strategies for many years. It is critical to effectively distributing tourists. A comprehensive system of "brown" tourism signposts, with a logical hierarchy of sizes and locations (advance junction and at junction) is not a mystery: other destinations can do it. The opportunity for the West to do it properly is obvious.

5.2.6 Human Resources

Providing an authentic rural tourism product involves considerable effort in pulling together the disparate and fragmented product of rural areas - accommodation, activities, attractions, landscape and community. Regional Tourism Authorities, as the statutory agencies responsible for tourism development at a local level, simply do not have the manpower to do this. The task of delivering a rural tourism product to date has relied on considerable voluntary effort by many pioneers of rural development. After ten years of voluntary commitment, it is hardly surprising that many involved feel isolated. Critical to achieving the potential of rural tourism will be a long term commitment to the human resources required to deliver the product required.

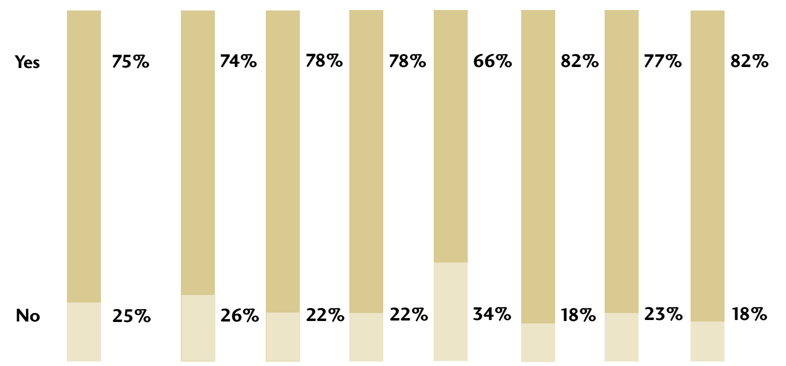
A major human resource concern is inadequate staffing. CERT in a recent study ***(Attitudes & Initiatives Required to Support Women in the Workplace,*** Tourism Development International, March 2000), highlighted the extent of difficulty in sourcing staff for tourism businesses. Table 5.1 illustrates numbers employed by region. It should also be noted that CERT has pointed out that 105,000 additional staff will be needed in the tourism industry over the 2000-2005 period. Chart 5.1 illustrates the regional differences in difficulty in recruiting staff.

Table 5.1 Numbers Employed in Tourism by Region

Region	Counties	No.	Total Employed
Border	Donegal, Sligo, Leitrim, Cavan, Monaghan, Louth	24,684	10%
West	Galway, Mayo, Roscommon	32,090	13%
Mid-West	Clare, Limerick, Tipperary (N.R.)	27,153	11%
Midlands	Laois, Offaly, Westmeath	9,874	4%
Mid-East	Meath, Kildare, Wicklow	12,342	5%
Dublin	Dublin	69,116	28%
South-East	Carlow, Kilkenny, Tipperary (S.R.), Waterford, Wexford	27,153	11%
South-West	Cork, Kerry	44,432	18%

Source: CERT Manpower Survey

Chart 5.1 Incidence of Difficulty in Recruitment of Tourism Staff (by Region)



Source: CERT/Tourism Development International

5.3 The Way Forward - A Zonal Approach

In order to address the issues highlighted in this report, and to release the potential of rural tourism in the west, nothing short of a paradigm shift in approach and thinking is required. More of the same will simply result in more of the same.

Such a shift involves, in the first instance, addressing the diversity of the region by adopting a spatial perspective. Tourism Development International has divided the area into tourism zones, which can reasonably be compared and contrasted with each other. The following key spatial considerations were used to determine where boundaries should be.

- Enclose an area sufficiently large enough to support a 3-5 day rural tourism holiday.
- Respect distinguishing physical boundaries (e.g. The Burren).
- Respect current tourist or local area recognition (e.g. West Clare).
- Avoid breaking county boundaries without good reason.
- Viability - small regions are unlikely to be viable and too many regions will confuse the customer.

5.4 Categorisation of Zones

5.4.1 The Significant Tourism Centres

The study area contains a number of significant centres of tourism. These centres play an important role in servicing many needs of rural tourism customers but they are not treated as part of the project because these centres are primarily mainstream destinations, falling outside the definition of rural tourism outlined at Chapter 3. They are:

- Galway City. The regional capital with in excess of 3,000 approved rooms.
- The Ennis/Shannon/Bunratty Triangle. The stretch of the N18 from Limerick to Ennis with over 1,400 rooms.

5.4.2 Larger Urban Areas

These have populations in excess of 10,000, as of course do Galway and Ennis above.

- Sligo
- Letterkenny

These have been excluded because they are urban rather than rural centres, although it is acknowledged that they serve the rural hinterland.

5.4.3 Designated Seaside Resorts

Many designated seaside resorts have seen rapid development and urbanisation. Although it is recognised that they serve a rural hinterland, they have very particular problems which are beyond the scope of this study.

- Bundoran
- Enniscrone
- Salthill
- Achill
- Westport
- Lahinch
- Kilkee

5.4.4 Rural Tourism

The rest of the territory of the seven counties is essentially rural in character and can all be considered potential rural tourism countryside, as defined in Chapter 3. We have divided up this region as follows.

(i) Mainstream Tourism Areas
  - The Burren
  - Connemara

(ii) Potential Mainstream Tourism Areas
  - West Clare
  - North West Mayo
  - East and South Mayo
  - North Sligo/Leitrim Glens
  - South Donegal
  - North Donegal
  - West Donegal

(iii) Special Interest Areas
  - East Clare
  - East Galway
  - South Sligo
  - Roscommon
  - Leitrim

5.5 Identifying Overall Needs

In order to assess each area's future rural tourism potential in a consistent and meaningful way, and to identify product gaps needing attention, each area has been examined under the following headings:

- Accommodation quantity
- Accommodation range
- Area appeal - the general characteristics and appeal of the zone and its current popularity with tourists
- Activities - the current potential for activity provision, including cultural provision, with particular emphasis on clustering and potential clustering.

In order to weigh up each area's strengths, each area attribute is given a scoring as follows

Very Good	Good	Fair	Poor	Very Poor
5	4	3	2	1

Scoring is, as far as possible, based on objective assessments derived from the product audit. Where it has been necessary to give a subjective view, the view is that of Tourism Development International.

5.6 Scoring Mechanism

5.6.1 Accommodation Quantity

Quantity of approved accommodation is judged as follows:

Very Good	(5)	1,200 + rooms
Good	(4)	1,000-1,200 rooms
Fair	(3)	800-1,000 rooms
Poor	(2)	500-800 rooms
Very Poor	(1)	< 500 rooms

5.6.2 Accommodation Quality

Accommodation quality is judged as follows:

Very Good	(5)	wide range of accommodation across all grades and types.
Good	(4)	good range of accommodation across most grades and types.
Fair	(3)	a mix of accommodation
Poor	(2)	a limited range of accommodation
Very Poor	(1)	a very limited range of accommodation

5.6.3 Area Appeal

Area appeal is a factor of county recognition as measured by Tourism Development International in recent market research assignments. The score is modified to sub county level based on the consultants' views of the area's scenic appeal.

Scoring is as follows:

Very Good	(5)	a very popular area with dramatic scenery
Fair	(3)	an attractive area which is popular
Poor	(2)	an attractive area which is not well known

5.6.4 Activities

Activities (including cultural activities) are scored as follows:

Very Good	(5)	excellent activity base at present
Good	(4)	good potential to build on current weaker activity base
Fair	(3)	reasonable potential
Poor	(2)	little activity at present, potential to specialise
Very Poor	(1)	limited potential

5.6.5 Access

Very Good	(5)	international airport/city within 30 miles, has rail access
Fair	(3)	airport/city within 50 miles, national road and rail access
Poor	(2)	isolated region

5.7 Audit Summary

5.7.1 Mainstream Tourism Areas

	Accom Quantity*	Accom Quality	Area Appeal	Activities	Access	Total
Burren	5	5	5	5	5	25
Connemara	5	5	5	5	4	24

* Resorts excluded

In the Burren there is a need to co-ordinate and package the excellent product base already in existence. Visitor management to avoid bottlenecks and spread tourism within the region is also a need.

In Connemara the main challenge is to spread tourism in an area which has a number of honey-pots (e.g. Clifden, Kylemore Abbey, Oughterard) and relatively isolated settlements away from these centres

5.7.2 Potential Mainstream Tourism Areas

	Accom Quantity*	Accom Quality	Area Appeal	Activities	Access	Total
West Clare	1	4	3	4	5	17
North West Mayo	4	3	4	5	3	19
East and South Mayo	4	3	4	5	4	20
North Sligo /Leitrim Glens	1	3	4	4	4	16
South Donegal	2	4	4	4	3	17
North Donegal	4	5	5	4	3	21
West Donegal	3	4	5	5	3	20

* Resorts excluded

There are potential accommodation shortages in west Clare and east Sligo if demand is stimulated. There is also room to improve the range and quality of accommodation. A good activity base exists. Poor access to Donegal is a significant barrier and there is scope for more accommodation if demand is stimulated.

5.7.3 Special Interest Tourism Areas

	Accom Quantity*	Accom Quality	Area Appeal	Activities	Access	Total
South Sligo	1	2	2	2	4	11
East Clare	1	2	2	4	5	14
East Galway	2	3	3	2	4	14
Roscommon	2	3	3	3	4	15
Leitrim	2	4	3	4	4	17

* Resorts excluded

Accommodation provision is weak in these areas, but this is a factor of demand. At present area appeal is weak also; this reflects current perceptions. But there is much scenic landscape in these areas also. Potential for activity and special interest tourism exists, and there is scope to improve rural tourism networks.

5.8 Towards a New Strategy

The three distinct zones in the region require differing treatments - **mainstream, potential mainstream and special interest.**

- In Zone 1 (Mainstream) the primary need is for effective visitor management, environmental protection and addressing human resource issues.

- In Zone 2 (Potential Mainstream) priority should be given to filling product and accommodation gaps, and to increasing area appeal through marketing and strengthening networks, and to human resource issues These potential mainstream zones must plan to absorb greater numbers of visitors and must market harder to achieve them, and train and recruit for that purpose.

- In Zone 3 (Special Interest) priority should be given to developing special interest product excellence and network strengthening, including business support and training for quality. These special interest zones have a greater challenge because they lack the scenic appeal of the Atlantic coastline. Here the development of gateway centres at the Shannon crossings as focal points for tourism in the eastern part of the region should be a key part of the strategy.

The current pattern of distribution of main tourism centres makes it clear that the dramatic Atlantic scenery of the west coast gives significant customer appeal. Galway and Clare are the most popular regions with visitors. Mayo, Donegal and Sligo can offer as dramatic a scenic experience, but do not have the same popular image, nor have they developed as extensive a product base.

For the rural inland areas, the challenge is greater. The Shannon corridor is a magnificent asset running from the north to the south of the region. It touches all of the inland regions - Leitrim, Roscommon, East Galway and East Clare and has significant unexploited potential. This ancient highway has left a rich legacy of heritage sites all along its shores. The cruising industry has not benefited from the massive growth in tourism to Ireland and Bord Fáilte is currently studying this sector to establish the reasons why. The Shannon is, however, also a natural barrier to east west transit, and access to the west is funnelled through towns at or near key crossings.

- Carrick-on-Shannon and Boyle (N4)
- Strokestown (N5)
- Ballinasloe (N6) and Athlone
- Portumna (N65)
- Killaloe and O'Brien's Bridge

These potential gateway centres are essentially rural in character. They can become the focus for a large rural hinterland. Similarly Lifford in Donegal is an important crossing on the Foyle.

They should be developed as counter balances to the popular west coast tourism centres and as the focus of development for the inland regions. By and large, however, within these inland areas, individual products of excellence with clearly defined market segments are essential to success. This is because the large mass of "general tourism", which is present around the coast, is not present in rural areas, hence uniqueness and quality of product are the keys to success.

In Part 2 of the report we set out the WDC's vision for the future and the strategy by which it can be delivered. The support of all involved - government, its agencies, the private sector and the community sector - is needed to make this happen.

part II

rural tourism strategy

The objectives of this project were to produce policies and objectives for sustainable tourism for inclusion in the new draft Development Plan for County Mayo, to suggest guidelines for tourism development in sensitive coastal areas in north and west Mayo and to recommend structures and mechanisms to improve the delivery of sustainable tourism

Guidelines for tourism development in the coastal zone were drawn up with specific reference to Achill and to Erris. However the broad thrust of the recommendations are applicable to a wide range of coastal and other locations.

Looking at guidelines for tourism development in particular, the study recommends that in order to be sustainable, future tourism development in the coastal regions for Mayo should:

- Respect the resources (cultural and physical), scale and character of the particular locations;
- Respect vernacular building traditions;
- Take account of pressure on water services, waste disposal, and energy usage;
- Bring employment and other economic benefits in the short-term without damaging the potential for future benefit from the resource;
- Optimise long-term benefit for the community as a whole rather than speculative gains for the few;
- Take place within a framework agreed by the community as a whole through a rural community network;
- Be integrated with other activities in the rural economy.

This study recommends that funding should be made available for small-scale projects and to support a marketing policy that takes account of differentiation between local areas.

One of the principal recommendations is that structures are put in place in order to provide for greater cooperation between agencies, the participation of local communities, and to devise an agreed strategy for integrated rural development including tourism.

The following changes are recommended at national and regional level to ensure the delivery of sustainable tourism:

- A new mission statement for Bord Fáilte to reflect a strong commitment to sustainable tourism and to ensure that policy can be put into practice.
- Formulation of a new rural tourism policy which recognises that rural areas can offer a distinct product rooted in the community as well as a range of activities based in a rural environment.
- Changes in funding policy and delivery at national and at regional level through the Operational Programme for the BMW region in particular, to give greater support to small scale enterprises and to rural community tourism as part of the mainstream.
- Training programmes with an emphasis on sustainable practices.
- Changes to the regulations and standards governing accommodation and other facilities to give recognition to the requirements of rural tourism.
- Differentiated marketing at regional level to reflect the different traditions and scope of holidays within a rural, as distinct from resort, environment.

6.1 A Shared Vision

Central to the Western Development Commission's approach is the view that unless all of the key players involved in tourism can share a vision on the way forward for rural tourism, progress will be extremely difficult. Tourism, as an industry, is a nebulous product often delivered by many players who are involved in

- accommodation
- activities
- attractions
- retail
- catering
- information networks
- tour operations
- ground handling
- transportation supply

Rural communities interact with these players and can be players themselves. Unless a sense of shared vision and purpose can be brought about little will be achieved. It is essential that this vision is embraced by the Department of Tourism, Sport and Recreation, Bord Fáilte, Regional Tourism Authorities and all other relevant agencies and key players, including the travel trade.

6.2 Vision Statement

Following extensive consultation, the Western Development Commission's vision for rural tourism in the seven western counties of Ireland is as follows:

The Western Region will offer an authentic, quality rural experience in an increasingly over-commercialised, urban world. The essential elements of this experience will be the quality landscape, cultural enrichment and interaction with friendly people. The region will be positioned as that part of Ireland where this experience is genuinely offered and can genuinely be found.

6.3 Vision to Reality

This vision is underpinned by the following observations:

- The WDC believes that rural tourism can play a greater role in the economic life of the West.

- A sustainable approach is essential, so that growth will take place in a gradual way, where relationships between tourists, the landscape and the host communities will be in balance. The WDC believes that this can be achieved. Indeed, tourism itself can raise awareness of the value and vulnerability of the heritage resource.

- The economic viability of tourism enterprises is also essential, but this may not always have been given priority. In many parts of the region the necessary products are in place, but co-ordination and links to the market are lacking. In short, the volume of business in rural areas needs to be improved.

- Access to the region (by air and road) must be made easier for the growing international short-break market.

- The essential qualities of the west of Ireland (as articulated in market research) are present and must be preserved. These are:
  - quality landscapes
  - lack of over commercialisation
  - genuine welcome of the people
  - sense of remoteness and peace

If this vision is to become a reality, it must translate into shared objectives for marketing, for the development of tourism products, for the provision of an economic and social infrastructure for tourism, and for state support for the sector. If all organisations can embrace the need to deliver this vision, the projected growth in visitor numbers to Ireland can be influenced to achieve a more equitable spread of benefits.

Not all parts of the west have the same potential. Existing infrastructure, proximity to current tourism centres, scenic landscapes and market image all contribute to the probability of success. In order to realise the vision outlined for the future of tourism in rural areas, all involved need to concentrate on seven key objectives and to adopt different strategies for each of the three zones outlined in Chapter 5. These are set out in the next chapter.

7. Dispersing Tourism Growth in the West

7.1 Introduction

A major shift is required in the way tourism development in the Western Region is being directed if a more even distribution of tourism growth across the region is to be achieved. It is a fact that tourists cannot be forced to go where they do not want to. However, the WDC believe that the means to achieve a shift is at the disposal of government and the tourist industry. It will be necessary to target growth in new areas while holding occupancies and avoiding displacement in existing tourist areas. Without such a shift, the future of Ireland's tourist industry is at risk.

There are seven essential elements in such an approach:

- The creation of a driving force for change which can give a clear strategic direction and deliver integration of support;
- A concerted effort to improve access to the West;
- A commitment to destination management and sustainability;
- The implementation of a well financed, co-ordinated marketing strategy encompassing the Western Region as a rural destination and the development of creative product packaging to meet customer needs;
- The maximisation of the product strengths of rural areas while ensuring environmental and heritage conservation;
- Filling accommodation and other tourism infrastructure gaps so that visitors can experience a genuine quality product;
- Creating the capacity to co-ordinate and deliver a quality product and excellent customer care through appropriate support and the fostering of partnership between the various tourism interests.

Each of the seven elements of the strategic approach need to be applied with differing degrees of priority, according to the needs of each of the three zones within the Western Region already defined in Chapter 5.

Zone 1 Current Mainstream	Zone 2 Potential Mainstream	Zone 3 Potential Special Interest
Burren	West Clare	South Sligo
Connemara	North West Mayo	East Clare
	East and South Mayo	East Galway
	NorthSligo/Leitrim Glens	Roscommon
	South Donegal	Leitrim
	North Donegal	
	West Donegal	

7.2 The Driving Force

The WDC is convinced that significant dispersal of tourism growth to predominantly rural areas, such as the seven-county Western Region, requires a major shift in policy and practice. Present structures are not equipped to deal with the extent and scale of intervention required to address the particular needs of developing tourism in rural areas. As a result of government policy, Bord Failte has largely shed its development role. Regional Tourism Authorities, which are under-resourced, are focused on the needs of their existing members, and while achieving commercial targets, cannot deliver the multiplicity of actions now required to address the need to disperse tourism development. Rural tourism co-operatives, where they exist, are also under-resourced, and are heavily reliant on voluntary input. Other agencies (local authorities, LEADER companies, Teagasc, FÁS) are assisting rural tourism in underdeveloped areas, but there is no overall plan for tourism dispersal to rural areas and no overall goal. Yet there is clear evidence of a growing market for tourism in untapped rural areas and recognition that the Western Region has the raw materials for that product in abundance.

Dispersal to rural regions such as the seven western counties **does not require the creation of any new body**, but requires the co-ordinated intervention of a wide range of existing bodies. Such activity must be strategically driven by the needs of the tourist, well funded and sustained over time. All of the relevant agencies of government must be involved and must combine to deliver what amounts to a major intervention to assist the development of tourism in the less-developed rural areas of the West.

7.3 Five Key Changes

In all, we put forward a total of forty nine recommendations to tackle the various elements of the strategy being proposed in this report. The first five changes are key, in that they underpin all the others. They relate to the structural changes needed give effect to the strategy and are as follows:

1. Establishment of a **High Level Steering Group** made up of the Department of Tourism Sport and Recreation, Department of Agriculture, Forestry & Rural Development, WDC, Bord Fáilte, Regional Tourism Authorities, local authorities and other departments and government agencies with responsibility for aspects of tourism and the environment. **The Steering Group should be chaired by a senior manager in Bord Failte**.

2. Implementation of the new strategic approach would require the appointment of an **Action Team** consisting of:

   - **A Co-ordinator of Tourism Dispersal-West** who would work for Bord Failte and liase closely with the Western Development Commission.

   - **A Team of Tourism Development Officers funded through a partnership of tourism interests and public funding** or redeployed from existing organisations.

3. **Additional funding** to assist Regional Tourism Authorities (in conjunction with the co-ordinator) to develop and disseminate best practice guidelines. This initiative would ensure that **all bodies working at local, county and regional level could follow a common strategic direction** in relation to product development and promotion, and the funding of such activities. The various sources of tourism **funding** coming into the region should be channelled in one clear strategic direction by agreement between all the agencies.

4. Facilitate the zoning strategy by encouraging the establishment of working private sector **rural tourism partnerships** in each of the zones, under the Regional Tourism Authorities which should include major community-based initiatives and tourism entrepreneurs. Such partnerships would focus on delivering 'area-based tourism packages', in conjunction with the Tourism Development Officers and Regional Tourism Authorities, as well as establishing strong links with the travel trade.

5. A **unit in the Department of Tourism Sport and Recreation** should be given overall responsibility for the delivery of the strategy in keeping with its overall objective of achieving dispersal of tourism to the regions.

7.3.1 Implementation of Key Changes

The **High Level Steering Group** would work on bringing a common focus to structures at national, regional and county level and on achieving relevant changes over a three to five year time span. **Bord Failte**, as the key state agency with responsibility for tourism dispersal in the context of the National Development Plan, should be the prime mover on this steering group which would oversee and monitor the implementation of the strategy.

The work of the **Tourism Development Officers** would be overseen initially by the Steering Group, but it is envisaged that they would work eventually under the aegis of either revamped Regional Tourism Authorities or County Development Boards, whichever appears most appropriate. From the beginning, the team would be expected to work closely with the Regional Tourism Authorities and other tourism interests, particularly LEADER groups and Irish Country Holidays.

The WDC recognises the **key roles of the Department of Tourism, Sport and Recreation and Bord Failte in instituting such changes, and in giving the necessary leadership to public and private interests at regional, county and local level. The Regional Tourism Authorities are also essential to the delivery of this strategy**.

In line with its remit to foster and encourage the co-ordination of national, regional and local bodies, TDI sees the WDC as having a key role to play in facilitating the implementation of changes in policy for greater dispersal of tourism growth and in tracking the effectiveness of these changes. The WDC's Western Investment Fund (WIF) will seek to invest in strategic initiatives which can accelerate the development of a co-ordinated tourism product in the region. Moreover, the WDC recognises that the delivery of this strategy need not be confined to the seven county Western Region and so, where appropriate, it can encompass the three designated tourism regions: MidWest, West and North West. In this way, the WDC can work as a catalyst for change while avoiding duplication of effort.

Delivering Change

Action	Timing	Cost
1. Establish Steering Group, chaired by Bord Failte, to implement study recommendations.	Immediate	Existing resources
2. Recruit or second Co-ordinator and Action Team.	Year 1	£100,000 p.a.
3. Develop and disseminate common strategic guidelines for action and funding.	Immediate	Existing resources
4. Facilitate rural tourism partnerships to develop product within overall strategic context.	Immediate	Existing resources
5. Dispersal unit in Department of Tourism to drive and deliver tourism dispersal strategy.	Year 1	Existing resources

7.4 Marketing and Packaging

7.4.1 Tourism Brand Ireland

Tourism Brand Ireland has been one of the driving forces behind Ireland's tourism growth. It has projected Ireland as a lively, friendly, interesting place to key target markets. There were core marketing objectives behind Tourism Brand Ireland which were aiming to shift perceptions of the destination away from being a rural idyll, towards being a modern, youth orientated cultural destination. Other objectives included reinforcing the 'island' image, which has meant extensive coastal scenery being used in brand material. The campaign is currently under review and this strategy would suggest that greater emphasis should be given to dispersal, and the promotion of potential future mainstream destinations and special interest areas. The research in this Report has revealed that the West and North West are not as well known as tourist destinations in other areas (i.e. the Cork/Kerry or Shannon Region).

7.4.2 Overseas Tourism Marketing Initiatives (OTMI)

OTMI has driven much of the funding of Tourism Brand Ireland. In 1999 a £7 million budget was spent in the USA, Britain, Germany and France. It is an all-island initiative with extensive private sector involvement. It is suggested that state sector input needs to emphasise developmental agendas as the private sector may have an agenda of filling existing premises rather than spreading growth to new areas. Moreover, the research in this Report has identified northern Europe as a source market for rural tourism. The Tourism Marketing Partnership - a partnership of representatives of the tourist industry and Bord Failte - is an important new arrangement for ensuring a strategic focus to tourism marketing at national level. A Tourism Marketing Fund of £150m has been agreed for destination marketing over the period 2000-2006. It is important that appropriate strategies for regional marketing complement and enhance the national effort in order to ensure dispersal.

7.4.3 Promotion at the Regional, County and Sub-County Levels

It is essential that current branding, marketing and promotional activities at all levels are streamlined so that they can be linked more effectively into, and thereby benefit from, the overseas marketing activities of Bord Failte.

The study area is broad and already divided between the Mid-West, Ireland West and North West Tourism regions. In view of the scale of the marketing challenge that undoubtedly exists, image building for the West at regional level in the promotion of tourism to rural areas is desirable. Therefore, there should be a consistent rural theme to promotional activities across the seven-county Western Region which could be extended to cover the three designated tourism regions involved. This would reflect the experiences sought by visitors to rural areas - see 7.4.5 below.

Counties already have strong identities and are the level at which most agency support can be brought to bear and at which funding can be provided. While they are important sub-units for promotion and sub-regional branding it is desirable that counties should incorporate and support the wider, cross-regional rural themes recommended above.

The present Irish Country Holiday co-operative approach involves creating destination images for new areas at sub-county level - Úna Bhán, Inishowen, Joyce Country etc. However, in view of the critical need for integration of support mechanisms and the need to avoid splintering of marketing effort, it is felt that the best sub-brand approach is at county level. It will help get local support, integrate with the strengthened county planning process and aid identification. County tourism companies are working well in some regions and are proving effective as marketing initiatives. The actual delivery of rural tourism product will however need to continue to be handled at sub-county level, as continued community involvement is critical to success. Communities must be given better support in return for their commitment.

7.4.4 Special Interest Campaign

A secondary well-funded and targeted special interest marketing campaign is required involving co-operation between counties and regions. This will highlight individual products of excellence ranging from game angling to archaeology. The approach adopted by Bord Fáilte in the 1980's - "Only the Best" (taking only best quality special interest products and putting branded marketing resources behind them) is a useful model. It requires a commitment to standards and their verification.

7.4.5 Co-ordinated Approach

The regional image must highlight regional strengths as well as reflecting the product attributes essential to the rural tourism experience identified in market research at Chapter 4 such as: quality environment, peace and quiet, outdoor activities, welcoming communities and local heritage.

What is sought is the practical commitment to a common purpose - bringing rural tourism fully into the mainstream support and marketing mechanisms of Irish tourism - Tourism Brand Ireland. The co-ordinator will have a crucial role in ensuring that the products being developed and assembled at county and sub-county levels are effectively incorporated into the overseas marketing drive at national level.

The Irish tourism product in rural areas does not have a high profile at present. Research shows that Ireland's 'rural image' is what attracts, but visitors go to coastal resorts and cities. The WDC believes that a market opportunity now exists to capitalise on the consumer desire for that rural holiday experience, which is becoming more and more difficult to find in mainstream Irish tourism. The advantages of a combined county campaign for rural tourism in the West are as follows:

- It allows all areas to combine resources to mount a more competitive campaign.
- It presents a greater variety of product, again offering greater competitiveness.
- It presents a wider holiday destination with more choice.
- It facilitates additional promotion of niche products in a structured way, and does not preclude individual initiatives.
- It offers savings because of economies of scale.

In order for a real commitment to rural tourism to be achieved, it is essential that the three Regional Tourism Authorities - West, North West and Mid West - work together with the local authorities to deliver the strategy.

It is futile to imagine that any of these organisations will enthusiastically support rural tourism in the way that is necessary unless they have ownership of the process and share the vision. It is a fact of life that resources do not exist to mount effective marketing campaigns to deliver the shift in visitor patterns needed at sub county level. If traditional tourism traffic plans are to be adjusted, a high profile and sustained marketing campaign is essential. Local authorities, rightly, need to be convinced that a real commitment to tourism in rural areas is being made. The full commitment of Regional Tourism Authorities is also critical. They must work together to ensure that the resources being made available for tourism in the west are put to best use.

In promoting tourism in rural areas in the West of Ireland, it is vital that a stronger relationship is built up between with Bord Fáilte, Regional Tourism Authorities and local communities. A perceived communication gap and breakdown in support is apparent from the market research and consultations undertaken for this report. On the other hand an excellent working relationship already exists between Irish Country Holidays and Bord Fáilte market offices. But by building stronger relationships the task of securing business for developing regions can be speeded up.

Tour operators also need to be targeted and cultivated. Market research carried out for this report shows that this has not been successfully addressed to date. The importance of the Internet in targeting the discerning potential rural tourism customer cannot be over-stressed.

7.4.6 Product Packaging

The West can offer many opportunities for genuine rural tourism experiences. In many instances the product is already there - massive investment in capital facilities is not the answer: better organisation and packaging is required and the private and community sectors are critical to making this happen. The role of Tourism Development Officers with a specific brief to facilitate such new developments is key. The Co-ordinator and the Team should work with tourism partnerships and local providers to ensure that tourism products are not promoted singly and instead are part of an organised package of local products. The Steering Group should work to ensure that policies at the regional level are consistent with the new approach and reflected in the funding priorities in the National Development Plan and those of the various support agencies. Otherwise, there is actually no mechanism for linking product development at the early stage and funding policies at the regional and national level.

Considerable value can be added to walking routes, angling holidays, activity and special interest holidays, if effective packaging relationships can be built up. Airlines, tour operators and Bord Fáilte staff will respond well to imaginative and quality controlled packages put together. Compliance with EU legislation in relation to packaging is also necessary.

Structures

Action	Zone	Timing	Cost p.a.
6. Establish combined (RTA) three region initiative to specifically and exclusively address the challenge of marketing of the West of Ireland as a rural tourism destination	1, 2, 3	Year 1	£250,000 p.a.
7. Establish "Only the Best" type special interest marketing campaign. (see 7.4.4)	3	Year 1	£250,000 p.a.
8. Secure budget for marketing involving commitment from all stakeholders. Model should maximise funding from the Regional Operational Programmes, cross border initiatives and other sources. Target of (£1.4 million p.a.)	1, 2, 3	Year 1	£1.4m

Market Planning

Action	Timing	Cost p.a.
9. Design Tourism Brand Ireland sub-brand for rural tourism in the Western Region	Year 1	£30,000

Trade Marketing

Action	Timing	Cost p.a.
10. Establish trade desk with mission to promote rural tourism in the West of Ireland by county as a realistic alternative for the travel trade	Year 2/3	£10,000
11. Target journalists for press coverage of developing areas	Year 2/3	£5,000
12. Conduct a major programme of educationals for the travel trade (e.g. overseas Bórd Fáilte staff, selected tour operators, ferry companies etc.). Priority: Europe, Britain, domestic	Year 2/3	£50,000
13. Co-ordinator and Team participate in appropriate Bord Fáilte and RTA promotions and workshops	Year 2/3	£5,000
14. Create internet site for the travel trade in conjunction with the RTAs.	Year 1	£10,000
15. Market packages supplied by county rural tourism officers to the travel trade	Year 2-3	£60,000
16. Devise joint promotions with the travel trade to target niche markets with niche products	Year 2-3	£100,000

Consumer Marketing

Action	Timing	Cost p.a.
17. Participation in domestic and international consumer fairs, in partnership with RTAs, Shannon Development, and Irish Country Holidays.	Year 2/3	£10,000
18. Develop a co-ordinated programme of press visits in conjunction with Bord Fáilte, RTAs, and Irish County Holidays.	Year 2-3	£10,000
19. Devise media campaign to raise profile of rural tourism in Western Region, in co-operation with Bord Failte.	Year 2-3	£10,000
20. Devise consumer internet site linked to travel trade and county sites.	Year 2/3	£30,000

7.5 Destination Management and Product Development

7.5.1 Sustainability

The principle of sustainability - so important to this product as highlighted in market research - recognises that the scale, pace and character of development must be controlled if the assets being exploited are to be preserved. It usually falls to local authorities to grant permission for development and to regulate its effects. A considerable strengthening of inter-agency liaison has taken place in recent years. Local area visitor management teams are increasingly being seen as essential to responsible tourism planning. Clearly, these will be required in the future for all zones: mainstream, potential mainstream and special interest. Guidelines are urgently needed to help local authorities preserve the visual character of the countryside. The Heritage Council has already developed a methodology to appraise, monitor and enhance the heritage resource of areas such as those targeted by this strategy.

7.5.2 Accommodation

The development of rural tourism is intrinsically linked with the development of accommodation. Increased overnights and visitor expenditure are often the economic goals of tourism development. Much rural accommodation, as illustrated in earlier chapters, is struggling to hold on to market share. The bed and breakfast sector in rural areas is experiencing particular difficulty. Bord Fáilte is currently carrying out research into the reasons for this and the solutions required. A consolidation of representative organisations and of booking systems is certainly overdue. The current branding of farmhouses where little farming is in evidence is also an issue under review. This is to be welcomed. Research undertaken for this report has clearly shown that the "genuineness" of the product on offer is a key issue for success. Failure to address the issue of unapproved accommodation is also a concern.

7.5.3 Maximising Product Strengths

One of the problems that has been identified with the current approach to rural tourism destination marketing in Ireland to date is that 'rural tourism' is seen as a distinct product with its own niche. Rural tourism is, in fact, a product made up of many different elements which, like general tourism, can have a broad appeal or target different segments of the marketplace. A stronger, more varied theme-based approach needs to be developed so that rural tourism is offering not just a 'rural tourism holiday' based essentially around accommodation, but is attractive to the wider mainstream market or 'special interest' tourism.

A number of key strengths emerge from the product audit undertaken. These are as follows: -

- Landscapes of international importance (Burren, Connemara, Mayo National Park, Glenveigh National Park, Co. Donegal) - coastal regions.
- Gaeltachta and Islands - coastal regions.
- Heritage, music and cultural traditions - all regions.
- The Shannon Corridor - East Clare, East Galway, Leitrim, Roscommon.
- Literature and the Arts - Sligo, Roscommon, arts activity developing in most areas.
- Upland walking country - East Clare, Burren, Connemara, Mayo, Sligo/Leitrim Glens, Donegal.
- Coarse angling - Leitrim, Shannon basin
- Game angling - Galway, Donegal

These strengths need to be built on in future development and marketing policy.

7.5.4 Destination Management and Product Development

(i) Sustainability

How visitors move within a region and what effect they have on the environment are issues which need to be addressed with more vigour. A "laissez faire" attitude to the demands of the market will inevitably lead to a situation where more and more congestion in a small number of honey pots will effectively ruin future prospects for the entire region. Bord Fáilte's Pilot Initiative on Tourism and the Environment, which has examined sustainability in areas such as Inis Mór (Aran Islands) and North West Mayo is the way forward (see case study). Responsibility is best applied at local authority level, as it is here that the means of intervention can most effectively be delivered.

Action	Zone	Timing	Cost
21. Local authorities to put in place visitor management schemes for mainstream tourist areas. These to examine carrying capacity, peak and through traffic movements, critical pressure points, means of intervention, marketing and demarketing.	1	Year 1	Existing resources
22. RTAs to plan visitor management for future mainstream tourists areas, identifying future growth centres, touring routes' carrying capacities, seasonality, marketing.	2	Years 1-2	Existing resources
23. RTAs to plan enhancement of special interest product strengths at destinations.	3	Years 1-3	Existing resources
24. A sustainable development plan for the Shannon corridor, especially the Upper Shannon tax designated area, is essential	3	Immediate	Existing resources
25. Involve rural communities in planning processes for local areas through County Development Boards.	1, 2, 3	Years 1-3	Existing resources

(ii) Accommodation

The issues here are supply, quality and price. All of these impact on occupancy, and good occupancy is essential to deliver viability. There are clearly areas where accommodation supply is weak (Chapter 5). But there are also issues of quality and competitiveness emerging as concerns from consultations (Chapter 3) and market research (Chapter 4).

Action	Zone	Timing	Cost
26. Provide support to increase accommodation capacity in areas of weak supply. • Bed and Breakfast • Guesthouse/licensed guest inns • Small hotels • Caravan and camping	2, 3	Years 1-5	Existing NDP & LEADER resources
27. Encourage preservation of "authenticity" through conversion of vernacular buildings rather than building anew.	2, 3	Years 1-5	Existing resources
28. Pilot revised "farm tourism" brand identity in the west (see case study). This could be linked to e.g. organic farming.	1, 2, 3	Years 1-3	Existing resources
29. Encourage development of specialist accommodation linked to special interest products, e.g. "bunk house barns" for walkers, "drying facilities" for fishermen, additional rooms to facilitate small groups.	3	Years 1-5	Existing resources
30. Encourage the licensing of all accommodation offered to visitors, as is the case in Northern Ireland (need for consistent all island approach).	1, 2, 3	Years 1-3	Existing resources
31. Develop and apply "green audit" and "heritage audit" criteria in association with the Heritage Council.	1, 2, 3	Years 1-5	Existing resources

(iii) Maximising Product Strengths

A wealth of product for rural tourism exists across the region. It needs to be integrated.

Action	Zone	Timing	Cost
32. The almost perpetual fragmentation of the tourism industry should to be addressed through public sector led marketing and product development support.	1, 2, 3	Year 1-5	Existing resources
33. The weather emerges as a key issue in market research. It cannot be dismissed. More weather independent facilities are required. These should take the form of initiatives such as quality municipal indoor pools where gaps exist, (e.g. Co. Roscommon) and flagship attractions to fill product gaps. • Sligo - possibilities include the Armada heritage and the potential of Lissadel Estate • Leitrim - reinforcement of the Shannon/cruising/water based theme. • Donegal - maritime heritage	2, 3	Years 1-5	Existing resources
34. The development of gateways to the West, as foci for the development of the eastern part of the region is called for. Each will require a specific, sustainable development plan to avoid the significant negative impacts of seaside resort tax driven development (Chapter 4). The following centres should be targeted. • Lifford • Carrick on Shannon • Boyle • Portumna • Ballinasloe • Killaloe • Athlone	2, 3	Year 1-5	Tax designation but sustainable development plan in advance essential
35. The integration and promotion of "green ways" (walking & cycling routes) represents a product opportunity. Much development has been fragmented at local level.	1, 2, 3	Years 1-5	Existing resources
36. A massive, but very fragile, bank of national monuments exists across the region. Many local communities wish to see them made more accessible, and also preserved. Getting the balance right is critical. Guidelines, priorities and professional support mechanisms from Dúchas are not always adequate.	1, 2, 3	Years 1-5	Existing resources

Action	Zone	Timing	Cost
37. The Department of the Marine has recently published extensive proposals for coastal tourism development, which are welcomed. A similar approach is needed for inland waterways development, in particular the Shannon, Corrib, and Foyle basins. The region's waterways and river systems are also a massive but fragile resource, which are increasingly under pressure from pollution.	1, 2, 3	Years 1-5	Existing resources
38. Providing special interest product excellence is a key theme of this strategy. This is a challenge for the private sector that the WDC can support through the WIF.	3	Years 1-5	Existing resources incl. Western Investment Fund
39. Apply "green audit" and "heritage audit" criteria to development proposals.	1, 2, 3	Years 1-5	Existing resources

7.6 Access

7.6.1 Background

Good access is fundamental to the success of a tourist destination. More direct flights to the west, better road access, improved rail service, and better signage are all strongly called for by those consulted as part of this study. Unless these issues are addressed from the visitors' perspective, the progress sought will be difficult to achieve. While improved air access is highly desirable, most visitors will continue to come by road. The commitments in the National Development Plan are crucial to success, and in particular the Western Corridor Route (Rosslare - Limerick - Galway - Sligo) is critical to improving access to and within the region. Rapidly upgrading visitor signage is a practical and deliverable action that will achieve results. Changing air traffic movements will be more difficult.

The access initiatives required to increase the Western Region market share in tourism, as suggested in the Tourism Trade Survey (Chapter 4) highlight the need for action as follows:

- Direct flights to the west, and more flights on existing routes.
- Improve transport from airports
- Improve rail and bus services
- Improve roads
- Improve signage
- More competitive fares

7.6.2 Air Transport

We believe that action should be focussed on Shannon, Knock and Derry airports as the priority air access points to the west of Ireland. While the majority of tourists to the west will still travel by road, the further development of Knock Airport and City of Derry Airport would seem to be a realistic solution, having regard to the need for building critical mass traffic for viability purposes.

The development of Derry Airport to serve Donegal and the Border counties could also provide an opportunity for a cross border initiative between the two governments. In short, the present six airports serving the western region will have to be prioritised according to present infrastructure and economies of scale.

7.6.3 Airport Linkages

The need for efficient transport services (bus and car hire) at regional airports is critical, if short break holidays in particular, are to be developed, particularly from the UK and European markets.

Bus services to the nearest town, taxi services, and car hire facilities must be available to arriving passengers.

7.6.4 Rail and Bus Services

The rail services currently carry significant passenger volumes and are important from a tourism perspective

- Dublin - Galway — 1 million passengers
- Dublin - Sligo — 600,000 passengers
- Dublin - Westport/Ballina — 450,000 passengers
- Limerick - Ennis — 100,000 passengers

The need for investment in rail infrastructure has been highlighted in the WDC Development Plan for the West, **Blueprint for Success.**

It is expected that Bus Eireann will continue to improve the quality of its services to the West, and recent government announcements to run Bus Eireann as a separate company should result in improved passenger services.

7.6.5 Roads

The WDC Development Plan for the West, **Blueprint for Success** highlights the importance of the road network for the region - accounting for 96% of internal passenger traffic. For the majority of tourists, access to the west is via the road network.

In addition to endorsing the WDC's recommendations for investment in roads as set out in its Blueprint report, we would particularly highlight the importance of the Western Corridor, linking Rosslare Port to the west through Limerick, Galway, Mayo, Sligo from a tourism development perspective. It is disappointing that the Western Corridor as such, does not extend to Donegal.

7.6.6 Signage

The challenge of delivering a comprehensive, prioritised and strategic signage scheme has yet to be successfully delivered by any county in Ireland. It is commonplace in Northern Ireland and Great Britain. The opportunity for the West to take the lead in this regard is obvious.

7.6.7 Support Mechanisms

Better access to the West is essential if rural tourism is to be developed. Access weaknesses have been highlighted as major constraints on growth throughout this report.

Action	Zone	Timing	Cost
Road			
40. The National Development Plan 2000-2006 will see significant improvements in the national road network east-west and north-south through the west. The coastal secondary route through Galway, Mayo, Sligo and Donegal will also be upgraded. A comprehensive system of "brown" tourism signposts should be implemented in parallel with these improvements.	1, 2, 3	Years 1-5	Existing resources
41. County by county comprehensive tourist signposting strategies should be implemented.	1, 2, 3	Years 1-5	Existing resources
Rail			
42. With the notable and significant exception of Co. Donegal, the West of Ireland has a good rail network with twenty stations still operating. Linkage to airports is very poor. An opportunity exists to integrate transport networks to assist tourism development	1, 2, 3	Years 1-5	Existing resources
Air			
43. Increased air access to the west is critical. We recommend that Shannon, Knock and City of Derry airports should be given priority in terms of encouraging international traffic. They have the best runway capacity, integration to the road network and geographic spread.	1, 2	Years 1-5	Existing resources
44. Better linkage from airports to nearby towns, and improved car hire facilities are required.	1, 2	Years 1-3	Existing resources
45. Public subsidy for regional airports is a closely monitored issue. A change in EU. restrictions in this regard is desirable to spur regional development.	1, 2	Years 1-3	Existing resources

7.7 Quality and Customer Care

7.7.1 Needs

A common thread to emerge from market research is that expectations for the quality of the rural tourism holiday experience are high. The concept of total quality management is the key to customer satisfaction and repeat business. It is increasingly difficult to deliver Ireland's traditional welcome in the face of commercialisation and high staff turnover. A comprehensive training and development programme and, in time, a recruitment drive for rural tourism, will be vital. This should be integrated with the Tourism Information Centre network and effectively be an 'outreach' for helping the visitor.

It is clear that the Tourist Information Centre network is presently seen as being too commercially driven and too consolidated outside peak season. A more developmental and service orientated approach is needed where new Tourist Office provision is seen as a key part of regional development. Running a professional, integrated Tourist Information service requires high levels of capital investment and human resources investment, in addition to professional branding, signage and outreach.

7.7.2 Support Mechanisms

The call for quality and the difficulty of delivering it consistently in today's competitive labour market are very clear from market research (Chapter 4) and consultations (Chapter 5). Rural tourism co-operatives have much to give through their pioneering of the "human touch" approach. A number of initiatives will be needed to deliver this illusive tourism goal.

Policy	Zone	Timing	Cost p.a.
46. A "quality control" system is very desirable, but difficult to deliver. It requires considerable resources and objectivity. The review of bed and breakfast branding by Bord Fáilte should be welcomed in this regard and piloted in the West. A West of Ireland quality mark scheme for the best of activity and other product providers should be developed by the brand manager.	1, 2, 3	Year 1-3	£60,000
47. A regional training initiative for tourism in rural areas needs to be developed to address potential skills shortages.	1, 2 3	Years 1-5	Existing resources
48. The Tourist Information Centre network needs to be made more developmental and less commercial. This means establishing more tourist offices in developing areas and keeping the network open longer. This has significant cost implications, which need to be shared by interests beyond the Regional Tourist Authority.	2, 3	Years 1-5	£250,000 per centre

appendix I

consultees and submissions

Appendix 1 - Consultees & Submissions

Co. Donegal

Coolmore Community Development
Donegal County Council
Inishmore Tourism Society Ltd.
Ionad Chois Locha
SOS Walking Tours
Tourism College, Killybegs

Co. Sligo

Coleman Heritage Centre
Marketing Sligo Forum
North West Tourism
Northwest Marketing
Rock View Hotel
Rural Homes
Sligo County Council
Sligo Indoor Carting

Co. Mayo

Ballintubber Abbey
Ballycroy Community Council
Ceide Fields
Culduff Cottages
Cuman Bádoiré Acla
Erris Region
Foxford Community
IRD Kiltimagh
Mayo County Council
Mayo Naturally
Moy Valley Country Holidays
Turlough Community Development Association
Westport Tourism

Co. Leitrim

Leitrim County Council
Leitrim County Strategy Group
Mican Ltd.
North Leitrim Glens
Shannon-Erne Waterway Promotions Ltd.

Co. Roscommon

Arigna LEADER
Boyle & District Angling Club
Cruachan Aí
Elphin 2000
Elphin Heritage Society
Enterprise Kiltullagh Ltd.
Keadue Development Association
Roscommon County Council
Roscommon Heritage Group
Roscommon Millennium Trust
Stroketown Park House
Suck Valley Angling Centre
Tulsk Action Group
Úna Bhán

Co. Galway

Connemara Walking
Corrib Country Ltd.
Clifden Chamber of Commerce
Forum, Letterfrack
Galway Corporation
Galway County Council
Glenamaddy Chamber of Commerce
Glinsk Community Development Society
Ireland West Tourism
Joyce Country
Killary Lodge
Michael Gibbons Walking Ireland
Woodford/Looscaun Development Committee

Co. Clare

Ailwee Caves
Clare County Council
Clare Tourism Council
Clare West
East Clare heritage
Killimer Tidy Towns
Kilrush UDC
Obair, Newmarket on Fergus
Shannon Development
The Burren Smokehouse
West Clare Leader Ltd.

National/Regional

Department of Tourism Sport and Recreation
Department of Agriculture, Food and Rural Development
Bord Fáilte
CERT
FÁS
Irish County Holidays
Irish Farm Holidays
Teagasc
Údarás na Gaeltachta
Irish Tourism Industry Confederation
Heritage Council
Regional Tourism Authorities
LEADER Companies
Partnership Companies

In addition, submissions were received from 13 individuals.

Notes