

VisitWiltshire

## The Great West Way Case Study Analysis



November 2016

## Executive Summary

This executive summary presents a high-level review of strategic learning for Great West Way partners, drawn from a series of project case studies undertaken by TEAM and EarthCheck for Visit England. Within this Executive Summary, the learning is presented on a thematic basis and are accompanied by a series of observations relating directly to the project's development. Learning and observations are categorised under the following themes;

- Branding
- Route signage and wayfinding
- Governance and stakeholder support
- Impact of the case studies
- Ticketing and bookability
- Innovations in digital presentation
- Environmental assessment
- Development approach
- General observations.

The later sections of the report identify learning from each of the individual case studies in greater depth, including identification of critical success factors and lessons on what elements of project delivery have not worked as well as expected.

### Branding

1. A theme which is demonstrated in a number of case studies is the need to be brand or proposition-led. Being brand or proposition led means more than a logo or a name. Simply put, a brand is a promise to a visitor, and having a consistent, credible brand is vital because it differentiates the offering from competing destinations - this is more than simply selling a product or place.

Being product-led represents the opposite type of approach. To use an analogy, this is like making keys first and then looking for locks to open. Testing how a proposition resonates with target audiences and the experiences they are looking for is an essential step if a major new experience or destination is being brought to market.

Visitors buy experiences, not products. To inspire visitors to embrace your story requires more than just a good idea. It requires a consistent application of key messages and an engaging story that keeps the audience emotionally connected to the ideas that underpin it. Those ideas and related experiences must be meaningful and rewarding for the customer. Definition of a brand framework will serve as a guide to developing experiences which will bring the brand to life. It typically includes steps such as; development of the DNA of what the destination or experiences are all about (its essence), its values and personality, and the rational and emotional attributes it offers visitors. Figure 2 (p11) describes the process which Fáilte Ireland undertook in developing a brand-led approach for the Wild Atlantic Way.

**Observations:**

- The Wild Atlantic Way provides clear learning. To disrupt the market or deliver a game-changing experience, a brand that has “cut-through” with target markets is essential. Local areas working individually with what at times were competing sets of experiences were not going to achieve the necessary impact.
- In the context of the Great West Way's development, what will be sold to target audiences will be more than a physical touring route; it will be the promise of memorable experiences which deliver on your brand promises i.e. ‘living and breathing 5000 years of history as you follow the setting sun westwards, experiencing an awe-inspiring view when you reach the crest of the hill, experiencing the very best of England's scenery pass gently by as you cruise the canal at a lavishly slow pace, creating life-long memories from meeting the makers of local craft beers’. An early development stage should be development and testing of these types of propositions to determine best fit and emotional connection with target audiences.
- In this context, a brand needs to cascade through high level propositions, themes, hero experiences, and supporting experiences – i.e. development of actual visitor experiences which deliver on the Great West Way's brand promises.

2. Take-up and usage of brands by businesses and local stakeholders varies across the case studies examined. As a rule of thumb, the earlier partners and businesses are engaged, the more effective take-up seems to have been. Fáilte Ireland has prepared brand guidelines to govern usage of Wild Atlantic Way logos, imagery and iconography by businesses and partners.

**Observation:**

- Genuine success for the successful adoption of a brand can be seen when businesses and partners fully embrace the concept, generating mutually beneficial outcomes. If early engagement is limited there is a danger of the concept being seen as the ‘Tourist Board's job’. Fáilte Ireland is now rolling out, in key locations along the Wild Atlantic Way, an experience development programme/toolkit which focuses on building business engagement with the overall Wild Atlantic Way brand and development of individual hero or signature experiences. As another example, Margaret River's ‘Your Margaret River Region’ brand has been successfully adopted by the wine industry as well as the tourism sector. In markets where it makes sense for both sectors to be present, the case for synergies and mutual benefits being generated has been well made.

3. Ownership and protection of IP related to imagery and branding is important, although protection can be limited when terms which are open to interpretation, are in widespread existing usage or feature geographic names are involved.

**Observation:**

- Fáilte Ireland has trademarked logos and icons associated with the Wild Atlantic Way and prepared brand guidelines to cover usage. Great West Way partners should consider similar protection mechanisms.

## Route Signage and Wayfinding

4. Physical signposting and interpretation remains a mainstay – the Wild Atlantic Way has delivered a large-scale signage and interpretation programme incorporating a series of signature discovery points.

### Observations:

- Physical signage still tends to be a core part of touring experiences whatever the transport mode.
- Wild Atlantic Way has a significant wayfinding infrastructure programme - signature discovery points (over 160 discovery points with 15 signature discovery points). With hindsight, Fáilte Ireland would have been more selective in developing the signature discovery point programme, because not all of the discovery points were sufficiently distinctive. However, development of a co-ordinated programme of signature discovery points is a useful case study exemplar.
- A potential opportunity for the Great West Way to provide an innovative wayfinding solution is through development of a three-pronged signage approach consisting of a new e-signage solution alongside a signage device and discovery points.

5. Most, if not all, of the touring route case studies reviewed utilise a mix of wayfinding techniques, from physical signposting and interpretation through to a range of digital technology and media.

### Observation:

- There is some conjecture about the value of apps as part of wayfinding strategies. Key considerations include: high development costs for sophisticated apps especially if native apps are developed for both Android and iOS operating system and the cost of constantly updating apps to ensure compatibility with operating systems as these are updated. Instead, some destinations are moving towards responsive websites optimised across mobile and other digital platforms as part of digital strategies, particularly as temporary updates (such as short term route closures due e.g. to weather or flooding) are easier to achieve for non-experts through the CMS of a website, rather than on apps.
- As part of wayfinding and experience delivery for Australia's long distance driving routes, a programme of iconic viewing points has been established for many of the planned routes. The Great Ocean Road does this especially well, offering high quality interpretation and storytelling at key journey points.

6. Queensland's drive tourism programme shows the benefits of a comprehensive approach which covers planning and policy as well as practical issues on signage consistency – e.g. it has developed guidance for local government to support consistent policy and practice for camping provision and rest areas.

**Observation:**

- As part of the Queensland Drive Programme, formal MOUs/ contracts between authorities along linear routes have made a tangible difference to the longevity of routes and partnerships.

7. The Great Ocean Road is currently in the middle of a route revitalisation plan, having reached a stage where infrastructure no longer met user needs.

**Observation:**

- Signing is expensive and regulation is tight so potential options for Great West Way include the addition of logos/icons to existing signing schemes, or selecting visitor hotspots as signature discovery points.

**Governance and Stakeholder Support**

It is highly likely that a linear route will cover several administrative jurisdictions. Consequently, clear governance structures have been important for all the case studies reviewed. Governance is unique to individual circumstances, but the case studies highlight several pertinent issues.

8. Queensland's drive tourism route committees demonstrate the value of instigating formal partner contracts or memoranda of understanding, locking in financial commitments. Similarly, Queensland's drive tourism programme has shown the benefits of Government commitment, facilitating tourism and transport departments to work cohesively as part of a whole of government approach.

**Observation:**

Delivering a visitor proposition over an area which encompasses multiple local government areas and agencies requires a transparent approach to management and governance which provides certainty for partners. Examples from the reviewed case studies include:

- Vennbahn's governance mechanisms also provide an interesting exemplar. The partnership was an association of 12 partners (from 3 countries) that successfully secured EU funds for Vennbahn. The partnership was led by one authority – East Belgium. Now the funds have been disbursed, the formal partnership has been dissolved and they have a more informal arrangement with a couple of meetings per year. Each local authority has responsibility for maintaining the stretches in their region. Overall marketing is currently led and funded by East Belgium's tourism marketing agency, as a strand of their ongoing regional marketing activity as it is regarded as an attack brand and visitor experience by them. They are however attempting to obtain funds from the other regions to support central marketing.
- Considerations for Great West Way partners include:
  - a. Ownership of IP
  - b. Financial and in-kind contributions

- c. Management and decision making processes
- d. Staffing
- e. Risk liability
- f. Roles and responsibilities (i.e. quality assurance/agreement on standards, route maintenance, marketing, events, accommodation and services development etc.).
- At this stage of the concept's development, case study exemplars indicate that the most appropriate management solution where form follows function would be: Identifying a lead partner organisation which assumes financial and management responsibility. This arrangement would be supported by contractual arrangements/MOUs which cover points a-f (above). As dictated by need, this arrangement could evolve into a separate management/ ownership vehicle such as a formal joint venture.

9. The need to engage a wide range of stakeholders, including those outside the tourism sector. As an example, Margaret River Busselton Tourism Association has established a close working relationship with food producers and growers to support its food & drink work.

**Observation:**

- Margaret River has done a great job in linking food and tourism sectors. Of 800 business members, 120 are wine producers. Its principal external funding programme (from a rural development agency) includes targets for increased volumes of wine sales as well as visitation and expenditure outcomes.

10. Access to financial resources clearly makes a real difference in terms of an organisation's ability to provide strong leadership.

**Observation:**

- Sensible investment gives the Great West Way the opportunity to be a game-changer proposition.

11. Alignment with national priorities ensures that initiatives can benefit fully from national and international market reach and distribution. Margaret River was particularly successful in this regard, tapping into Tourism Australia's priority for food and drink marketing.

**Observation:**

- Margaret River's food & drink work coincided with the national tourism organisation, Tourism Australia, championing food and drink as a central component of its marketing strategy and investment. Margaret River as a destination would not have achieved the same level of impact without successfully leveraging the extended reach provided by national and international marketing.



12. Fáilte Ireland has recognised the benefits of engaging communities at an early development stage – local ownership was viewed as being important in terms of embedding the initiative.

**Observation:**

- Communities along the Wild Atlantic Way have bought into the concept. In hindsight, Fáilte Ireland would have engaged communities earlier, because advocacy from communities has been valuable in fully embedding brand values.

13. Business engagement is viewed as essential for long term sustainability and success – without businesses delivering the essence of touring route experiences, initiatives are unlikely to deliver on their potential

**Observation:**

- Ten years ago, Ireland absorbed the regional tourism organisations into the national tourism agency (Fáilte Ireland). A gap emerged between FI and tourism businesses. Now FI is seeking to engage businesses in visitor experience development plans at the local level. In the case of Queensland's drive tourism routes lack of business commitment to the routes meant that when public funding dropped away, the initiative faded quickly. In the St Olav Ways example, business engagement has been particularly successful, with success attributed to the strength of regional centres which can connect directly with hard-to-reach micro businesses and the local volunteer communities. Managers become known faces and are more trusted than a distant HQ.

The inference is that to ensure longevity and sustainability, the concept needs to be sold to businesses at an early stage, particularly if the concept will rely on partnership or co-op marketing funds.

### Impact of the Case Study Projects

14. All the case studies reviewed have demonstrated success to greater or lesser degrees, although there is limited evidence of outcomes at the destination level. Wild Atlantic Way's Operational Plan proposes a comprehensive set of performance measures; hard data on its performance is limited so far, but anecdotal feedback is positive. In Australia, the Margaret River initiative has been tasked to achieve broader strategic objectives. Availability of hard economic impact information from the case studies is very limited.

**Observations:**

- Margaret River provides a great example of leveraging support from its regional development agency by successfully aligning strategic objectives in the food and drink and tourism sectors. Its MOU/funding agreement contained targets for visitation growth and growth in volume of wine sales. Although this approach was unique to Margaret River as a destination, the successful alignment of economic objectives across sectors shows the potential for generating additional support/ funding. If opportunities to align the Great West Way as a place to visit alongside broader liveability, investment and workforce objectives can be identified, opportunities to

obtain support from sources such as LEPs and rural development or skills funding schemes may become apparent.

- Big/bold projects which disrupt the market do show evidence of being catalysts for change - the Wild Atlantic Way is starting to create the case for SMEs to change their behaviour and extend their seasons, and anecdotal evidence shows that the concept is starting to drive investment decisions.
- Many of the case study projects reviewed are long term initiatives - potentially best served by KPI programmes which include short-term direct outputs (i.e. ROI on marketing campaigns, stakeholder participation/engagement, accommodation occupancy levels etc.) as well as longer term outcomes such as perception change (measured longitudinally in visitor surveys) or visitation/expenditure targets.

### **Ticketing and Bookability**

15. Many destinations have dropped the use of bespoke booking engines, given that there is no market failure, nor real profitability, and it is very rare for booking solutions to extend to tours or itineraries. Of the case studies reviewed, only the Swiss and Margaret River examples provide booking engines. Margaret River's approach which profiles an extensive range of set tour itineraries from commercial providers which can be booked online (not dynamic booking) provides an interesting approach.

16. City passes (e.g. in Vienna, Singapore, Bordeaux) which cover transport, entry to attractions etc. are widespread. However, development of destination itineraries which provide bookable packages (accommodation, experiences, travel) seem to be relatively rare. Examples in Spain, France and Belgium as well as the Swiss example demonstrate that via effective partnerships between transport providers and the tourism sector, it is possible to develop booking solutions which provide integrated experience and travel itineraries for visitors. Other destinations such as Ireland have decided not to engage directly in the booking process, but place emphasis on effective marketing and use of third party distribution channels. In the transport sector, booking platforms also tend to be bespoke to individual needs and specific to certain products or services. The Swiss example is rare in providing booking of multiple services, but appears not to have a major impact on the market or to be highly profitable.

#### **Observation:**

- Bespoke booking solutions are expensive – alongside a trade and distribution focus, best value for Great West Way may be achieved via third party booking agency partners.

17. Effective distribution of products and experiences is a priority for all destinations. Fáilte Ireland has produced a trade manual to support its trade-orientated work and profiling with domestic and inbound tour operators.

18. Partnerships with transport companies, such as train or canal boat operators, offer potential for the Great West Way (particularly if their routes serve a significant part of the Great West Way). However, best value in terms of developing a ticketing and booking



solution may be achieved via seeking a partnership with an established incoming tour operator or a booking agency.

**Observation:**

- There is potential for partnerships with transport providers along the Great West Way, to engage them in providing tour options for visitors travelling along the route. In the case of Vennbahn, the lead tourism agency offers tours which they operate in-house, as a way of proving the business case to the trade. This has been partially successful already, with one commercial operator now featured as a trade partner.

**Innovations in Digital Presentation**

19. All the case studies take a professional approach to marketing activity. Mixes of traditional campaigns, print and digital media have been used in most instances, however it is not clear whether activity could be described as innovative. Commentary on individual approaches is included in section 3 of the report.

**Environmental Assessment**

20. All routes reviewed are reliant on a high-quality environment, but only the Wild Atlantic Way seems to have undertaken environmental impact assessments as a core part of planning development and operations. Extensive environmental auditing was carried out in the development stages with environmental impact as one of the programme's KPIs.

**Observation:**

- Environmental assessment and auditing was a necessity for Fáilte Ireland on the Wild Atlantic Way, however they have embraced the environmental rationale – keeping the 'wild' in the Wild Atlantic Way. Parts of the route also have heavy visitation i.e. Cliffs of Moher which need the active application of visitor management techniques.

**Development Approach**

21. All the route case study examples have benefitted from comprehensive investment i.e. capital investment in infrastructure, supported by marketing and product development where appropriate. In the case of the Wild Atlantic Way, the programme has also benefitted from business development support.

**Observation:**

- As a project developed from scratch, Wild Atlantic Way's components are instructive; they include branding, marketing, events, experience development, business support/development – indicative of the comprehensive approach needed to bring a major new experience to market. These principles will be relevant to development of the Great West Way.

## General Observations

### Observations:

- Most touring routes have a clear central focus or physical spine even if multi-modal options are available – Wild Atlantic Way is a good exemplar being based around a core touring route. On this basis, Great West Way should seek to establish a clear core proposition or set of motivators.
- Big and bold projects are required to achieve substantial market impact and deliver against local, regional and national objectives.
- Governance solutions will necessarily be unique to individual circumstances but in principle the concept should be treated as a company bringing a commercial proposition or service to market. Wild Atlantic Way's development is guided by a comprehensive 5 year operations plan.
- Being brand-led in bringing a proposition to market is a common characteristic. In several case studies, experience development, delivering “stories rather than stuff”, is regarded as essential to support the brand promise.

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## 1. Introduction

VisitWiltshire has received funding from phase 1 of the Discover England Fund (DEF) to support development of the Great West Way project. To help inform ongoing project development, VisitWiltshire has commissioned TEAM Tourism Consulting to analyse and present a summary of learning from a series of DEF case studies currently being prepared for VisitEngland.

Case studies have been analysed on the basis of the following vision and concept for the Great West Way.

### **Great West Way: Vision and Concept**

Vision: To create one of the world's premier long-distance touring routes from London to Bristol".

Aim: Creation of a new world class tourism experience, winning new business and market share for Britain, raising awareness, growing the visitor economy and transforming the visitor experience along and around the route.

Concept: The route includes many of Britain's most iconic attractions - London, Windsor, Avebury & Stonehenge WHS, Castle Combe, Lacock, Bath, Bristol, and The Cotswolds. The route is well-suited to embrace the development of slow tourism, encouraging visitors to explore trails and itineraries along and around the route, linger longer, exploring in depth, and embracing quality over quantity. Although the whole London to Bristol route is only approximately 125 miles, this approach means highlighted routes are likely to be over 500 miles. The Great West Way is envisaged as being do-able by a range of transport options; car, train, canal boat, bike, walking; and being relevant to a range of product types – e.g. food and drink itineraries, heritage trails, development as a cultural route.

### High Level Potential Objectives

- Generate short, medium and long-term additional tourism visits and spend, increase dwell time and achieve high satisfaction along, and around, all parts of the route.
- Improve linkages between a range of attractions and activities
- Use smart destination technology to provide an innovative virtual signage and interpretation solution
- Improve transport and other visitor-related infrastructure along the route
- Direct visitors to less-visited areas by creating branded itineraries and experiences along and around the route.
- Increase growth, productivity and partnership working via a programme that encourages stakeholders and businesses to work together on a single compelling proposition that brings benefits to all.
- Increase and improve the quality and range of product, for example attracting new accommodation in areas where supply is low.
- Work with the trade to ensure bookable product is available in target domestic and international markets.

- Be a major catalyst for change.

## 2. Case Study Analysis: Summary

A series of DEF case studies are currently being prepared for VisitEngland;

- Touring Route: Ireland's Wild Atlantic Way
- Food and Drink Experiences: Margaret River Region, Australia
- Cultural/Walking Routes: St Olav Ways, Norway
- Experience Development Programmes: Canada's Signature Experiences
- Transport-based packaging: MySwitzerland
- Cycling Routes: The Vennbahn Cycle Route

The primary focus of this report has been placed on the case study examples that are felt to be most relevant to the Great West Way proposition.

Additional emphasis has also been placed on drawing out learning on:

- Governance, particularly where multiple stakeholders are involved
- Impact of the case study projects, in terms of spending and jobs and in stimulating new investment, e.g. in new attractions
- Take up of the brand by the industry – the extent and manner in which this was done; and, more specifically, how they handled the copyright issues and

- Signage – how that has been handled and the outcomes achieved.

The summary analysis presented in Figure 1 highlights the case studies which were considered to be applicable to the Great West Way. Although examples such as the Wild Atlantic Way are clearly directly relevant, all the examples provide some learning which can be applied to the concept of developing a high quality, multi-modal touring route such as the Great West Way.

**Figure 1: Case Study Relevance Analysis**

	Wild Atlantic Way	Canadian Signature Experiences	Cultural routes - St Olav Ways	Cycling routes - Vennbahn	Food & drink - Margaret River	Transport based packaging - Switzerland	Queensland Drive Tourism Programme	Great Ocean Road Touring Route
Brand proposition and action	✓	✓	✓	✓	✓	✓	✓	✓
Take up of brand by industry – brand guidelines, copyright	~	~	✓	~	✓	✓	✓	✓
Signage	✓	~	✓	✓	~	✓	✓	✓
Securing stakeholder/ partner support	✓	✓	✓	✓	✓	✓	✓	✓
Governance – particularly multi-stakeholder	✓	✓	~	~	✓	✓	✓	✓
Impacts/effects <ul style="list-style-type: none"> <li>• Visitor spend/jobs</li> <li>• Stimulating new investment</li> <li>• Catalyst for change</li> </ul>	✓	~	✓	✓	~	✓	✓	✓
Innovation in presentation on the web	~	~	~	✓	✓	~	~	~
Ticketing and bookability	~	~	~	✓	~	✓	~	~
Environmental assessment	✓	~	~	✓	~	~	~	~
Critical to success/'must dos'	✓	~	✓	✓	~	~	✓	✓
What didn't work well	✓	~	✓	✓	~	~	✓	✓

The VisitEngland DEF case study learning has also been supplemented by experience drawn from other relevant examples, including;

- Great Ocean Road, Australia.
- Queensland Drive Tourism Programme, Australia.

## 2.1 Summary of Case Study Examples

### Touring Route: Wild Atlantic Way, Ireland



Fáilte Ireland developed and implemented the Wild Atlantic Way as a large-scale new tourism programme. As its primary objective, the programme sought to grow economic contributions from international visitor markets.

The Wild Atlantic Way is Ireland's first long-distance touring route, stretching along the Atlantic coast from Donegal to West Cork. Supported by a substantial programme of infrastructure investment and experiential product development, the project aims to develop a branded route that will achieve greater visibility for the west coast of Ireland in target overseas tourist markets.

The Wild Atlantic Way destination brand was developed with a specific objective to be a unifying proposition for the West Coast of Ireland. Three overarching themes have been identified to guide the future development of the Wild Atlantic Way:

- Spirit of Adventure (Adventure);
- Life Shaped by the Atlantic (Culture), and
- Where Land and Sea Collide (Landscape and Seascape).

Notable features of the Wild Atlantic Way as a case study include:

1. The Wild Atlantic Way is an over-arching brand which individual destinations and businesses can use to leverage much greater visibility and clarity of message in the international marketplace. The brand has been delivered in the first instance, through the identification of a coastal touring route which joins up several pre-existing roads and routes as well as many towns and villages, attractions and experiences.
2. The Wild Atlantic Way has been devised as a new 'experience' and 'destination' to present the west coast of Ireland as a compelling international tourism product - seeking to achieve a level of cut-through which individual destinations would be unable to achieve.
3. At the outset, it was assumed that only a small proportion of visitors would 'do' the entire Way, however there was a need for the 'Way' to have a scale and depth of experiences to create 'visibility' in international markets and for it to function as a device which can draw people back to the west of Ireland for a repeat visit.
4. Although positioned as a touring route rather than a drive, there was acceptance that core visitor markets (at least in the short term) would largely experience the Wild Atlantic Way through self-drive trips (95% car travel). While it is intended that infrastructure will be substantially enhanced over the course of the programme, the Way is based around a core touring route proposition (existing road infrastructure) supported by a wide range of walking, cycling and water-based trails. Loop itineraries, and walking/cycling/water-based options will continue to be developed over the course of the programme.

### **Transferable Learning from the Wild Atlantic Way**

- **A Strategic Approach:** The Wild Atlantic Way is fully embedded within a strategic experiential approach at national level – one of three core propositions critical to the success of Ireland's tourism industry. The benefits accrued from being able to fully leverage national/international marketing and support activity should not be underestimated - the ability to tap into/complement national tourism marketing themes is important in this regard.
- **Thinking Big:** Neither half measures nor the status quo would achieve the necessary impact to address the challenges facing the tourism sector. Fáilte Ireland and partners have committed to a large-scale, long term programme. The potential market impact available from the depth and range of experiences incorporated within Wild Atlantic Way exceeds what could have been achieved by individual regions or council areas. A large-scale project which seeks to disrupt or shift the market stands the best chance of achieving its objectives when integrated within the context of overall strategic tourism objectives.
- **Strong Leadership:** Strong leadership and financial backing from Fáilte Ireland to drive the project was essential. A core team of 19.5 FTEs supports programme implementation. While the same scale of investment is not likely to be possible for the Great West Way, the need for strong leadership is important.
- **A Clear Proposition:** Although presented as a 'way' accessible via a range of transport modes, and the longer-term ambition is to create touring loops which provide options for cyclists and walkers, a core touring/driving route is at the heart of the Wild Atlantic Way. After the brand was identified, the core road route (existing road network) or spine was identified to form the central 'experience' to be promoted. While the Great West Way is based on the premise of being an experience which is accessible via a variety of transport modes, it is important that there is a core route experience or spine at its heart.
- **Wide Ranging Partnership:** While nationally led, development and implementation has required Fáilte Ireland to engage with a wide range of partners including; environmental, cultural and heritage agencies, local government, business support providers and local communities. Similar partnership needs are likely to apply to the Great West Way.
- **Brand/ Proposition Led:** The Wild Atlantic Way destination brand was developed with a specific objective to be a unifying proposition for the West Coast - a compelling proposition which had the potential to make the necessary impact in international markets. The brand is significantly more than just a logo. It needs to cascade through high level propositions, themes, hero experiences, and supporting experiences – i.e. development of actual visitor experiences which deliver on the Great West Way's brand promises.
- **Brand Management:** Brand guidelines have been established to help businesses and partners understand usage of the Wild Atlantic Way brand. The Wild Atlantic Way is now a registered trademark and Fáilte Ireland encourage qualifying industry partners to use marketing materials provided they follow the guidelines governing its use. Brand guidelines define use of the brand for qualifying industry partners; Irish Tourism Providers, Festival and Event Organisers, Tour Operators, Overseas Tour Operators and On-line Travel Agencies. For Irish tourism providers, eligibility is tightly controlled - Fáilte Ireland's

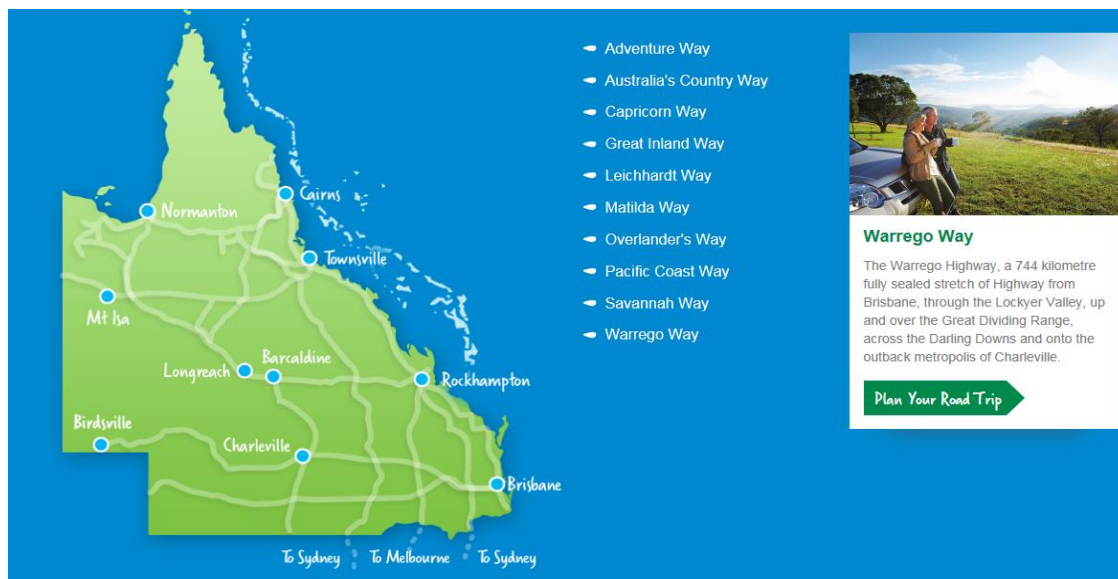
view is that that further a business is away from the Atlantic, from views of the Atlantic, or from a Wild Atlantic experience, the more 'off-brand' they become.

- **Stakeholder Buy-in:** Genuine success for the successful adoption of a brand can be seen when businesses and partners fully embrace the concept, generating mutually beneficial outcomes. If early engagement is limited, there is a danger of the concept being seen as the 'Tourist Board's job'. Fáilte Ireland is now rolling out, in key locations along the Wild Atlantic Way, an experience development programme/toolkit which focuses on building business engagement with the overall Wild Atlantic Way brand and development of individual hero or signature experiences
- **Comprehensive Investment Approach:** Establishing the Wild Atlantic Way and bringing it to market has required a comprehensive investment approach covering; capital investment in wayfinding and route development/maintenance, marketing and branding investment, digital platforms, business support, experience development and partnership formation. The need for this type of holistic approach is also likely to be applicable to the Great West Way.
- **Trade Support:** Securing buy in and commitment from industry and travel trade – while the Wild Atlantic Way programme does not seek to provide direct online booking solutions, significant resources have been directed towards ensuring take up of the 'Way' proposition by tour operators. Evidence gathered from the case studies overall suggests that more emphasis tends to be placed on trade engagement rather than developing bespoke booking solutions.
- **A Practical Approach:** The Wild Atlantic Way is largely a self-drive destination at present. The route has consciously been positioned as a touring proposition, with information on transport options provided and walking/cycling options being developed, however the project accepts the reality that the 'Way' is most readily accessible via self-drive. Initial investment has focused on improving the quality of this experience with walking and cycling loops also being added. A key learning was that in launching a large scale project such as Wild Atlantic Way, it is impossible to have all aspects fully operational in year 1 - realistic phasing based on a clear operational plan is an important consideration.
- **Engaging Communities:** Ownership of the concept by residents and communities can help embed the concept. Fáilte Ireland with hindsight would have engaged communities at an earlier stage in the development process.
- **Wayfinding:** Alongside use of digital media, a significant wayfinding infrastructure program has been established, based on signature discovery points (over 160 discovery points with 15 signature discovery points). With hindsight, fewer discovery points may have been selected as not all were felt to be sufficiently distinctive, however co-ordinated usage of discovery points is can potentially be a valuable learning for the Great West Way.
- **Environmental Assessment:** Environmental assessment and auditing was a necessity for Fáilte Ireland on the Wild Atlantic Way, but they have embraced the rationale, recognising the importance of keeping the 'wild' in the Wild Atlantic Way. Parts of the route have heavy visitation e.g. Cliffs of Moher which need the active application of visitor management techniques.

**Touring Route: Queensland Drive Tourism Programme, Australia**

Support for drive tourism will play a part in contributing to the Queensland Government's goal of increasing overnight visitor expenditure in Queensland to \$30 billion per annum by 2020.

Many of the state's regional cities and towns rely on the drive market to support their economies (70% of the overnight leisure market in Queensland). Lack of transport options outside the metropolitan areas means that large parts of Australia are drive tourism destinations. Drive tourism is a core part of Queensland tourism proposition - 10 long distance driving routes criss-cross the State and link into a wider network throughout Australia.



The sustainability of Queensland's drive tourism market depends on the number of visitors embarking on self-drive journeys, the length of their journey, the time they spend in particular places, and the amount of money they spend.

The strategy to revitalise drive tourism recognises the potential to:

- Enhance drive travel experiences to visitors travelling in and around the state and encourage visitors to travel beyond major tourism destinations;
- Encourage longer stays in regional centres, creating greater spend within the region; and
- Promote driver/traveller safety whilst creating new travel experiences.

The case study focuses on the governance and marketing lessons which are applicable to development of the Great West Way. The State's comprehensive approach to delivering high quality touring experiences is also noteworthy - a coordinated programme of policy, regulation, planning approvals, infrastructure and marketing initiatives.

### **Transferable Learning from the Queensland Drive Programme**

While Queensland's work focuses on driving routes, many of the operational and development principles can apply to the Great West Way;

- **Effective governance:** A strong lead from Government (State level) has been critical in driving drive tourism initiatives forward and maintaining momentum.

- **Formal commitment:** Each long-distance drive route is governed by a route committee. Queensland's route committees were based on formal contracts or memorandums of understanding which provided for financial contributions from partners over a set period. With hindsight, this commitment has helped tremendously in terms of implementation and building longevity for the routes.
- **Experience Development:** To fully capitalise on the potential of touring routes, businesses must be fully engaged – if they aren't engaged at the outset, there is a danger that the route becomes 'The Tourist Board's job'. The ideal relationship is mutually beneficial - businesses developing unique experiences which a) leverage off route marketing and b) add value to the overall route experience.
- **Sustained Tourism Marketing:** Early experience from Tourism Queensland's marketing for its drive tourism routes was that planning for sustained investment was crucial. Routes were launched to a fanfare of publicity, however, when this wasn't sustained, impact dropped away quickly. Without the State-level financial support (or co-operative marketing funds provided by industry) appeal was lost – the routes became standard parts of destination marketing rather than special experiences. From the Queensland experience and destinations elsewhere in Australia there are several principles which can be applied to touring routes of varying types. Section 3 details this learning in full, but the key considerations include;
  - Sharing and delivering a cohesive story to visitors
  - Consistent signage & collateral
  - Creating iconic moments: lookouts & road Infrastructure
  - Integrated communication.

## Touring Route, Great Ocean Road, Australia

Running west from Melbourne, the Great Ocean Road is acknowledged as one the world's premier touring routes. It has been included as a case study from the perspective of route development. Its longevity as a tourism destination and touring route provides a small number of valuable insights which may be applicable to the Great West Way's development.



As well as the road/touring route itself – the name which the entire tourism region goes by, the Great Ocean Road Region also offers extensive cycling and walking opportunities, including;

- The Great Ocean Walk, Surf Coast Walk and Great South West Walk - formal long distance walking trails which offer a range of shorter loop opportunities
- Disused rail lines which have been converted to walking and cycling trails (Port Fairy to Warnambool Trail, Camperdown to Timboon Rail Trail and Old Beechy Rail Trail)
- A range of mountain bike trails including Forrest Mountain
- Glenelg River/Kayak Trail
- Themed foodie/gourmet trails including the 12 Apostles Gourmet Trail and Otway Harvest Trail.

Based around its spine - the famous touring route, the Great Ocean Road Region benefits from a strong depth of experiences based around nature-based assets, food/gourmet tourism, heritage, adventure and arts and crafts.

However, the region acknowledges that it has challenges to address. The current Master Plan for the region aims to sustainably manage and grow the visitor economy, recognising the importance of the economic, environmental and social health of the region. In keeping with this situation; the very high visitation, short length of stay and low yield experienced at many locations in the region requires a strategic response. Issues associated with high



visitation are particularly prevalent during peak periods, and include impacts on the environment and the residents of the coastal communities. As such the Master Plan sets a vision which aims to increase yield by enhancing the visitor experience. This will be achieved via prioritising improvements to existing experiences, developing new products and services, and improving infrastructure. The upgrade and maintenance of public assets is an urgent priority to improve tourism outcomes. Due to increasing demands on government funding, the condition of visitor infrastructure has deteriorated in recent years.

#### **Transferable Learning from the Great Ocean Road**

The Great Ocean Road is an example of a high-profile destination which has a touring or driving route at its heart. Alongside the touring route, over several years, it has developed a high-quality range of complementary experiences. Relevant considerations for the Great West Way include;

- **Formal Naming:** The formal naming of the route as the Great Ocean Road has been invaluable in building brand recognition and ownership – the entire region's tourism proposition has built up over several decades around this core proposition.
- **Story Telling:** Interpretation throughout the route (particularly at scenic lookouts and viewing points) does an excellent job of telling the region's stories.
- **Co-ordination and Ownership:** Although the regional tourism organisation covering the route was only established in 2015, the clear ownership now being delivered has already started to pay dividends in terms of improved ownership, accountability and advocacy. Although visitation has been increasing, growth in value of tourism has not kept pace with peer group domestic visitor destinations during the period that a regional tourism body was not in place. The Master Plan for the region sets out a clear strategic direction which had been lacking.
- **Route Maintenance:** Although perhaps stating the obvious for a road-based touring route, maintaining and managing the physical infrastructure is critical. As population and visitor numbers have increased, this has not taken place in on a co-ordinated basis along the Great Ocean Road - some infrastructure is no longer fit for purpose in a premier destination. A \$50m investment programme is now in place and the region's Master Plan has set out a strategic plan of action, however with hindsight these plans should have been instigated some time ago.

#### **Cycling and Walking Routes: The Vennbahn Cycle Route, Northern Europe & Cultural/Walking Route: St Olav Ways, Norway**

##### **Vennbahn**

Cycling Routes, focusing on the Vennbahn Route were identified as an important group of case study exemplars for consideration in relation to the Discover England Fund.

The Vennbahn Cycle Route is Europe's longest disused railway cycle path, specifically developed as a tourism product exploiting the rail bed and associated infrastructure of tunnels and bridges, the region's scenic beauty and its cultural heritage. The cycle trail stretches 125km from Aachen in Germany, through east Belgium ending in Luxembourg. Extensive regional cycle networks (Vennbahn Plus) are available with lengths between 30

and 50km and of different degrees of difficulty, passing through unique landscapes and cultures.

In developing the route, four key elements were regarded as keys to success: the natural environment, infrastructure, services, and marketing.

### **St Olav Ways**

Walking is Britain's most popular outdoor recreation. It is popular among international visitors with nearly one quarter (24%) of overseas visits including a 'walk in the countryside' and 8% a 'walk by the coast' in 2011'. The domestic market is also strong: 16.5 million overnight domestic tourist trips to GB involved a long walk, hike or ramble (minimum of 2 miles/1 hour) in 2015, rather more than "visiting a beach" at 14.91m trips. Numerous walking trails and routes are being developed aimed at showcasing the country's wilderness, wildlife, natural environment and landscapes and there is a cause and effect relationship with the rising numbers of walkers.

Some key trends in longer distance route markets and users' expectations have been identified in a Scottish Natural Heritage (SNH) report on Longer Distance Routes. These include:

- Increasing competition from domestic and overseas destinations – more national and international destinations are providing diverse activities and high quality recreational routes, supported by quality accommodation and visitor services (e.g. guided holidays, cycle hire between tourism centres).
- A significant proportion of walkers, cyclists and other route users are seeking 'softer', more comfortable, experiences – the principal markets for longer distance routes are not self-sufficient, long distance walkers but those seeking multi-day, or day, trips from home or holiday accommodation, on well-maintained and signed routes, with readily available information and good places to stay, eat and drink.
- Use of public transport – where suitable public transport services, including trains and buses which will transport bicycles, are available and convenient, walkers and cyclists will take advantage of such services to travel to the start of, or return from, a linear route - especially where they wish to walk or cycle longer distance routes in day, or multi-day, sections.

Common factors identified as important to the success of Long Distance Routes include a credible, well signed route through iconic landscapes; visual variety; historic or other additional interest; easily accessible start and end points; clear signage and waymarking; readily identifiable well-spaced refreshments and accommodation; and availability of good route guides, packaged booking and luggage transfer services.

The case study focuses on Norway's St Olav Ways - being regarded as a premier example of relatively newly developed long distance pilgrimage route.

### **Transferable Learning from St Olav Ways**

- **Local Engagement:** Public sector led initiatives need to build strong connections with “grass roots” operators, building trust and enthusiasm. Business engagement has been particularly successful in the St Olav Ways attributed to the strength of regional centres which can connect directly with hard-to-reach micro businesses and the local volunteer communities. Managers become a known face and are more trusted than a distant HQ.
- **Slow Tourism:** The watchwords that stand out from the St Olav Ways visitors' experiences are: personal, distinctive, authentic, and natural. It is a good example of slow tourism.
- **Matching Assets with the Physical Challenge:** Walkers are not put off by a hard physical challenge, if there are appropriate support services in terms of welcoming accommodation.
- **Distinctive Local Cuisine:** Local food is part of the sense of place, and an important strand of rural tourism.
- **Meeting the Locals:** Meeting local people makes the St Olav Ways a living cultural experience.
- **Spiritual Niche:** The outstanding cultural and religious heritage is valued as a “spiritual work-out”; the purely religious aspect appeals only to a minority.
- **Preference for Mobile - Optimised Websites:** There is some conjecture about the value of apps as part of wayfinding strategies. Key considerations include: high development cost for sophisticated apps especially if native apps are developed for both Android and iOS operating system and the cost of constantly updating apps to ensure compatibility with operating systems as those are updated. Some destinations are moving towards responsive websites optimised across mobile and other digital platforms as part of digital strategies, particularly as temporary updates (such as short term route closures due e.g. to weather or flooding) are easier to achieve for non-experts through the CMS of a website, rather than on apps.
- **Digital Mapping Tools:** Effective digital mapping tools should be adopted, including GPX.
- **Maximising PR:** Press/media coverage and blogging is a powerful tool.

### **Transferable Learning from Vennbahn**

- **Positive Market Trends:** Given the importance of Europe as a market for cycling tourism and as a source market for England, together with the trends identified in this case study, the potential market for cycling tourism products in England appears considerable.
- **Planning for the Mainstream:** Cycle paths should be routed through areas that are scenically attractive and/or have heritage and cultural assets to maintain the interest of cyclists, especially the mainstream sightseeing/holiday cyclists, rather than enthusiast markets.
- **Cyclist Safety:** Cycling routes need not be completely traffic-free, but where they use public roads, these should have low traffic volumes and significant stretches should be purpose-designed for cycling.
- **E-bike Opportunities:** E-bikes are increasingly in demand and give confidence to less experienced cyclists, allowing them to tackle longer or more demanding routes.

- **Limited Adoption of Booking Functionality:** Cycling tourism is not a sector that has not yet adopted technology or “bookability” tools, despite the frequent use of social media and apps such as Strava by the enthusiastic cycling community.
- **Integration with Rural Tourism Experiences:** Cycling tourism can be an effective way of developing rural tourism product. The national cycle network co-ordinated by Sustrans already offers 10-12 “challenge routes” that are planned with cycling tourism in mind. However, Sustrans readily admits that its role is in developing and joining up cycle paths and not in tourism related interventions or promotions.
- **Adoption of Apps:** Apps are favoured by some long-distance cycle routes, but not all. La Loire a Velo has continued to update and develop their app since its launch in 2013 and it is promoted with a QR code from their home page. Vennbahn has recently launched one; conversely Sustrans have dropped their App as the costs of keeping it up to date were too high. Plans and costs for developing an App must include a strategy and budget for their ongoing development, and must be deliberately marketed. Increasingly, responsive websites offer a lower cost alternative that have improving functionality and are easier to update by non-specialists.

### Destination Packaging: Switzerland Tourism and Partners

Traditionally, the creation and sales of 'packages' was the preserve of the tour operator, who had direct access to airline seats via the GDSs and inventory allocations or free sale arrangements from accommodation and car rental suppliers, enabling instant booking via travel agents or, to a lesser extent, tour operators direct. The advent of the low-cost airlines and of the web as a medium for marketing and sales had a fundamental impact on the extent and nature of travel trade packaging. Consumers were willing and able to make their own bookings direct, at equally good or better prices. However, many destination products and services have been difficult or time consuming to book directly online. Consequently, some major suppliers and destinations have attempted to gain competitive advantage, by making it easier for consumers to create their own destination packages - either by providing easy access to a range of components or, in some cases, by dynamic packaging.

This case study example consists of a set of interrelated booking and packaging initiatives of Switzerland Tourism (ST), and its partners, accessible through its website, MySwitzerland.com. ST, the national marketing and sales organisation for Switzerland has developed a simple and easy-to-use platform for bookings via the Switzerland Travel Centre (STC), a separate vacation specialist company established by ST. The STC is responsible for the e-commerce aspect of the joint web platform - i.e. selling services and processing bookings (fulfilment). ST provides the destination content that stimulates and guides customers to use the STC booking service.

ST is also one of the founders of Swiss Travel System Ltd (STS), along with the Swiss Federal Railways (SBB) and public transport providers throughout the country. STS's mission is the joint international marketing of Switzerland's comprehensive public transport network, including STS' range of travel tickets and passes, as well as the promotion of cross-border travel to neighbouring countries.

### **Transferable Learning from Destination Packaging**

- **Multi-Agency Partnerships:** The overriding success factor in this Swiss example is the successful collaboration between Switzerland Tourism, Swiss Railways SBB and the hotel associations.
- **Catalytic Impact:** The integrated online booking system on Switzerland Tourism website (MySwitzerland.com) allows users to book hotels, apartments and holiday rentals, trains or combined public transport and leisure offers (art and museums, fun, sports and recovery). STS's aim was to pool and purposefully direct marketing efforts outside Switzerland in order to promote Swiss public transport services abroad. In this regard the partnership promotes the publication of Swiss public transport services and has been instrumental in contributing to a sustained increase in revenue.
- **Destination Packaging is Relatively Uncommon:** Examples in Spain, France and Belgium as well as the Swiss experience demonstrate that via effective partnerships between transport providers and the tourism sector, it is possible to develop booking solutions which provide integrated experience and travel itineraries for visitors. Other destinations such as Ireland have decided not to complement their touring route with being directly involved in the booking process, but place emphasis on effective marketing and use of distribution channels. In the transport examples examined, booking platforms also tend to be bespoke to individual needs and usually only will be applicable to certain markets or transport modes. Investigating partnerships with transport companies, for instance – a train operator; offers potential for the Great West Way (particularly if it serves the route's spine).
- **Third-Party Opportunities:** Given the experience gathered from the case study examples, best value for the Great West Way in terms of developing ticketing and booking solutions may potentially be achieved via seeking a partnership with an established incoming tour operator or a booking agency.

### **Food and Drink Experiences, Margaret River, Australia**

Margaret River is located on the west coast of Australia approximately 3 hours' drive south of Perth. The region incorporates the local government areas of Shire of Augusta-Margaret River and City of Busselton. The region benefits from being able to offer a varied product offering – stunning natural assets including beaches with world class surf breaks, tall-timber forests and ancient caves, as well as its world class culinary offerings. Long recognised as one of Australia's premium wine regions, Margaret River is home to 95 cellar doors and more than 120 wine producers.

Margaret River is an exceptional example of a region which has successfully developed its food and drink experiences into a major visitor proposition – being regarded by many as Australia's premier gourmet region. This case study highlights key aspects of the region's work in developing its food and drink experiences. Rather than being a distinct project, in Margaret River's case, food and drink work has become a core element of overall destination management delivery. Although not a touring route, the Margaret River Case Study does provide some useful learning on experience development and packaging.

### **Transferable Learning from Margaret River Food and Drink Work Programme**

- **A High-Quality Product as a Starting Point:** The region offers a genuine depth and quality of food and drink experiences. In this sense, the Great West Way also has a ranging group of high quality visitor experiences, potentially including food and drink.
- **A Signature Event:** The Margaret River Gourmet Escape is a high-profile event that draws people to the region. The event is credited with providing the step change that elevated regional awareness. The concept of a must-see experience or trip motivator applies equally to most destinations or touring routes.
- **Timing:** Margaret River Gourmet Escape's instigation in 2013 has allowed the region to surf the wave of food and drink popularity - enabling the region to have a high profile in Tourism Australia's Restaurant Australia campaign. Similarly, if the Great West Way is able to tap into national marketing themes, this would offer similar types of benefits.
- **Alignment:** Margaret River provides a great example of leveraging support from its regional development agency by successfully aligning strategic objectives in the food and drink and tourism sectors - its MOU/funding agreement contained targets for visitation growth and growth in volume of wine sales. Although this approach was unique to Margaret River as a destination, the successful alignment of economic objectives across sectors shows the potential for generating additional support/funding. If opportunities to align Great West Way as a place to visit alongside broader liveability, investment and workforce objectives can be identified, opportunities to obtain support from sources such as LEPs and rural development or skills funding schemes may become apparent.
- **Adding Value:** MRBTA's work on itineraries, interpretative stories and building distribution of tour options has started to add significant value. Although not dynamic booking, MRBTA's consumer website offers a booking solution for over 100 commercially provided tours. These types of functionality would also potentially be beneficial in implementing the Great West Way.
- **Proposition/ Brand Led:** The adoption of Your Margaret River Region branding across all aspects of tourism in the region, including marketing and signage, provides a common look and feel across products and a consistent regional brand message. Consensus suggests strong support for the brand.

### **Experience Development Programme: Canadian Signature Experiences Collection**

The Canadian Signature Experiences® (CSE) collection is a qualified inventory of Canadian visitor experiences that best exemplify Canada's tourism brand. The role of the collection is to *capture the attention and imagination of consumers around the world to entice them to visit Canada now.*

The collection is based on unique and exceptional travel experiences that are engaging and immersive and provide the opportunity to *discover, learn and enjoy Canada in ways that are personally relevant and aligned with their motivations to travel.* To qualify, the experience must meet a range of mandatory criteria and must appeal to one or more Explorer Quotient® traveller segments and be aligned with the country's brand and unique selling propositions. Originally launched and managed exclusively by Destination Canada in



2011, the collection has grown from 48 experiences to almost 200 and is now co-managed with the provincial and territorial marketing organisations. The cost of running the programme is essentially staff time.

Although not directly relevant as project to the Great West Way, the programme does provide some useful experience in terms of brand-aligned innovation and bringing new experiences to market.

#### ***Transferable Learning from the Canadian Signature Experiences Programme***

- **Brand-aligned Innovation:** The collection has encouraged brand aligned innovation within industry and has promoted the philosophical shift away from selling products and activities toward developing and delivering unique and memorable experiences at a relatively limited cost – essentially the cost of time to administer and oversee the programme. These experiences now differentiate Canada in the marketplace, help create the 'movie' of Canada in the mind of the traveller and are the basis of more meaningful destination experiences. The programme showcases a method for identifying high quality experience to align with destination priorities.
- **Sales Tool:** From the travel trade's perspective, the CSE collection is a valuable sales tool and is used extensively by receptive tour operators in building itineraries. Indeed, in many ways it is the activities of the travel trade and media that are now driving the programme. The challenge is to ensure that these activities associate the member badge with the qualified experience rather than with the company or business.

### 3. Case Study Review

#### 3.1 Branding

##### Touring Route: Wild Atlantic Way, Ireland

###### **Brand Proposition**

The Wild Atlantic Way is an over-arching brand which individual destinations and businesses can use to leverage much greater visibility and clarity of message in the international marketplace. The brand has been delivered in the first instance, through the identification of a coastal touring route which joins up several pre-existing roads and routes as well as many towns and villages, attractions and experiences.

The Wild Atlantic Way was devised as a new 'experience' and 'destination' by Fáilte Ireland to present the west coast of Ireland as a compelling international tourism product.



###### **Wild Atlantic Way Brand Vision**

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

Despite being delivered as a touring route, the project was brand-led from the outset – initial project work and research focused on developing the brand proposition, identity and key market segments - route identification, wayfinding, delivery of discovery points, selling experiences and marketing of the route.

The Wild Atlantic Way destination brand was developed with a specific objective to be a unifying proposition for the West Coast of Ireland. Three overarching themes have been identified to guide the future development of the Wild Atlantic Way:

- Spirit of Adventure (Adventure);
- Life Shaped by the Atlantic (Culture), and
- Where Land and Sea Collide (Landscape and Seascape).

In order to capitalise on the existing network of cycle ways and walking routes, the original name of 'Wild Atlantic Drive' was deliberately changed to 'Wild Atlantic Way' so that it would not imply to the visitor that the Wild Atlantic Way is just about driving and that there

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

It is also important to note that the Wild Atlantic Way proposition does not exist in isolation – it is a core part of Ireland's tourism marketing and development approach - in practical terms, this means that it is well placed to fully leverage the benefits of national marketing initiatives.

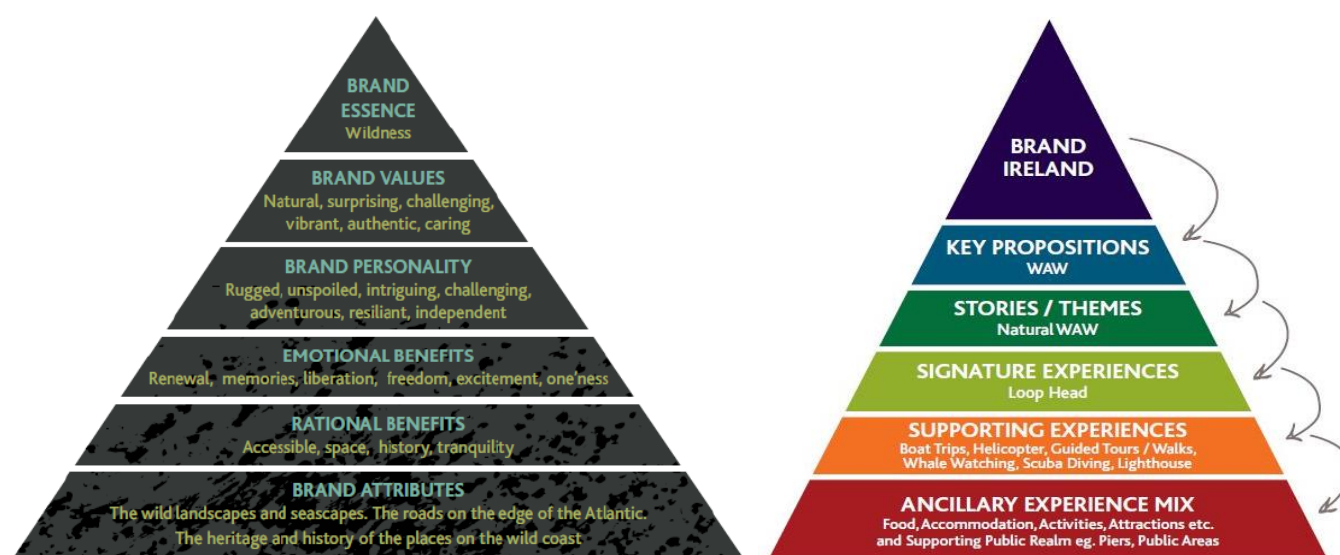
The Wild Atlantic Way is designated as one of three Key Propositions (Iconic or 'Big Ideas'). These key geographically based, thematic propositions have been identified as being of strategic tourism importance internationally.

» Dublin » **Wild Atlantic Way** » Ireland's Ancient East

Fáilte Ireland's strategy in growing the tourism economy is grounded in the principals of experience development. An Experience Development Framework serves as the guiding structure for the development of Ireland's key tourism propositions ('big ideas').

Associated with each of the key tourism propositions are several related 'Signature Experiences' and many 'Supporting Experiences' which are identified for their ability to deliver on the essence of one of the propositions. The Experience Development Framework sets out the relationship between Brand Ireland, key propositions, themes, signature experiences, and supporting experiences. Propositions such as the Wild Atlantic Way are intended to serve as the magnet to gain international visitor attention

**Figure 2: Ireland/ Wild Atlantic Way Brand Pyramids**



### **Brand/ Proposition Implementation**

To preserve the attributes and qualities of the brand for the benefit of all, particularly, those who trade under it, Fáilte Ireland has trademarked the Wild Atlantic Way brand and logo.



Brand guidelines have been established to help businesses and partners understand usage of the Wild Atlantic Way brand. The Wild Atlantic Way is now a registered trademark and Fáilte Ireland encourage qualifying industry partners to use marketing materials provided they follow the guidelines governing its use.

The Brand guidelines define use of the brand for qualifying industry partners;

- Irish Tourism Providers
- Festival and Event Organisers
- Incoming Tour Operators
- Overseas Tour Operators
- On-line Travel Agencies.

For tourism providers, eligibility is tightly controlled - Fáilte Ireland's view is that that further a business is away from the Atlantic, from views of the Atlantic, or from a Wild Atlantic experience, the more 'off-brand' they become.

In addition, while implementing its 2015-2019 Operational Programme Fáilte Ireland will devise and introduce a Brand Charter for businesses and providers that wish to carry the Wild Atlantic Way brand. The purpose of such a Charter is to demonstrate continual improvement towards excellence in terms of sustainability and experience development, and to validate and enhance the reputation of the Wild Atlantic Way brand in terms of its stated values.

Copyright protection is limited to a degree – only a certain degree of protection can be applied to geographic names or areas.

Take-up of the brand by industry has been significant. This process is expected to accelerate as route marketing continues and experience development plans for each of the regions along the routes build engagement and understanding with businesses. Anecdotally, local banks have contacted Fáilte Ireland to check the voracity of the concept as part of their checks on business financing proposals.

Key learning for the Great West Way include;

- Wild Atlantic Way is a brand-led project - the starting point before thinking about the detail of the physical route. The Wild Atlantic Way destination brand was developed with a specific objective to be a unifying proposition for the West Coast of Ireland - a

compelling proposition which had the potential to make the necessary impact in international markets

- The brand and concept is integrated as a core part of Ireland's tourism strategy. Wild Atlantic Way is fully embedded within a strategic experiential approach at national level
- Clear brand implementation guidelines are actively administered to govern usage.

### **Touring Route: Queensland Drive Tourism Programme, Australia**

Since the early 2000s Queensland Tourism authorities have placed significant emphasis on drive tourism as a core part of overall marketing. A drive tourism strategy remains an important part of overall strategic planning. The vision for drive tourism is for Queensland to be Australia's number one drive tourism destination by 2020. This will be achieved by showcasing outstanding experiences throughout the state. Visitors will have access to reliable information, delivered in user friendly and innovative ways across a range of mediums as they plan their journey and while they are holidaying. Accommodation, roadside infrastructure, rest areas and dump points will be well planned and will enhance the drive tourism experience.

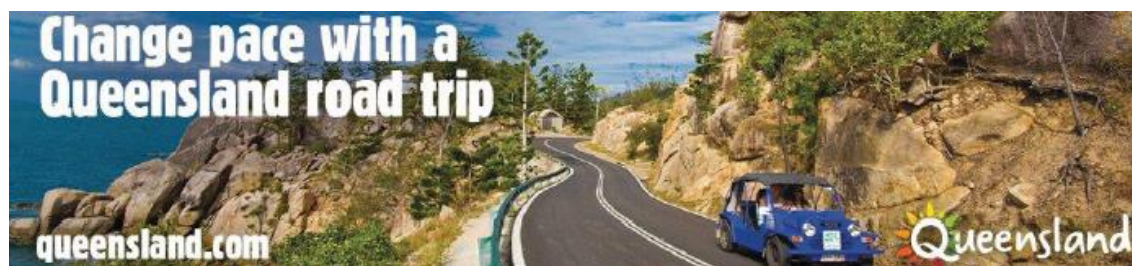
Nearly a decade has passed since Queensland's first strategic touring routes were established and database of over 60 journeys (short trips to multi-destination journeys) are currently promoted. Drive tourism is completely integrated as part of Tourism and Events Queensland's (TEQ) overall marketing approach. TEQ's Global Brand Strategy was developed so that Queensland's diverse experiences and destinations are promoted in a way that appropriately connects with visitors. Under the Global Brand Strategy, marketing is focused on the tourism experience and the emotional response of the consumer. The consumer market is divided into six segments:

- Active explorers;
- Stylish travellers;
- Self-discoverers;
- Unwinders;
- Connectors; and
- Social fun seekers.

Drive marketing activity promotes experiences aligned to four key themes relevant to the Queensland Brand Strategy. These are:

- Queensland lifestyle—food, wine, produce, events, shopping, and indulgence Queensland style;
- Natural encounters—reef, rainforest, flora and fauna;
- Adventure—outback, theme parks, wildlife parks, adventure activities, sailing, diving; and

- Islands and beaches—reef experiences, water activities, surfing and beach culture.



Key issues of relevance to the Great West Way include;

#### **Integration within overall marketing approach**

- Drive tourism routes are a core element of the State's overall marketing approach, reflecting destinations' hero experiences.

#### **Consistency**

- Consistent branding has been applied to individual routes, flowing through from PR activity and campaigns to route signposting

#### **Take up of Route Branding by Businesses**

- Each route is managed by a route committee who govern usage of brand collateral – logos, imagery etc. Some routes have been more successful in this regard than others.

### **Touring Route, Great Ocean Road, Australia**

The Great Ocean Road was built by returned servicemen between 1919 and 1932. Considered the world's largest war memorial, it was intended as both a memorial to those who lost their lives in World War 1 and to assist settlers in transporting produce; opening up land, aiding development, and, importantly, enhancing the tourism potential of the region.

Several branding issues are noteworthy in the context of the Great West Way's development:

#### **Naming and Designation**

Over time, recognition of the road as one of the world's great driving routes has grown. In 2011, the road was added to the Australian National Heritage List, and the official road name is gazetted as the Great Ocean Road, meaning that for nearly 100 years the 'brand' has been in the local psyche.

#### **Organisational Change**

To support ongoing development as a destination, a recent merger of the regional tourism organisations in the area included a shift to become the Great Ocean Road Regional Tourism Ltd – the DMO covers the entire region, which shares its name with the original road/driving route [www.visitgreatoceanroad.org.au](http://www.visitgreatoceanroad.org.au).



### **Evolving the Brand**

The regional brand is well established and has been a key factor in growing the economic value of tourism in the region however branding is not without its challenges. The entire tourism region and brand features the name of road itself, however research highlights that visitors' knowledge of the region is often quite narrow and at times nostalgic (icons such as the route itself and key assets such as the 12 Apostles). The regional tourism organisation considers that it is critical to focus on increasing visitors' knowledge of the region's product and experiences at the point of trip planning to support a shift from intent to take a day trip to planning for an extended stay.

A review of the region's brand has recently commenced. To align with a greater emphasis on destinations, and to reflect the differentiation in their products and experiences, this process will include a review of the positioning and signature experiences of key destinations. The brand review process will provide guidance for product and experience development priorities for each destination within the region over the next three to five years. The refreshed brand is intended to shift consumer perceptions of the region as a passive, visually spectacular destination for sightseeing and photography, to a perception of the region as embracing an individual's desire to connect and immerse in nature. It aims to create a shift from viewing the region as passive, to active, or in some cases adventurous. The greatest challenge for the region from a brand perspective is influencing and facilitating changes to messaging by the broader stakeholder groups promoting the Great Ocean Road, along the entire travel industry supply chain.

### **Cycling and Walking Routes: The Vennbahn Cycle Route, Northern Europe & Cultural/ Walking Route: St Olav Ways, Norway**

Effective branding has been an important contributor to the success of the cycling and walking routes studied. The scallop shell is one of the most iconic symbols of the Camino de Santiago and has been used to identify pilgrims since medieval times. It is now used, along with the yellow arrow, to guide pilgrims and is universally recognised and adopted both formally and informally – sometimes as simply as a yellow painted arrow daubed on a tree.



St Olav's Way and the Vennbahn, launched in the current era have both used branding to promote a distinctive identity, and provide recognition of the routes as a high-quality provider.

St. Olav Ways - the pilgrim paths to Trondheim - is a network of authentic, historical routes leading through outstanding scenic landscapes and historic attractions to St. Olav's shrine in the indoors Cathedral. The branding is required to communicate two key elements:

- The spiritual aspect of pilgrimage and the distinctive cultural heritage which is also being promoted. It has been developed as a rural initiative, involving communities and small

scale farmers who have willingly engaged with the ethos and proudly use the branding in their businesses and in the community information boards.

- The brand logo is owned and managed by the National Pilgrim Centre in Trondheim which has overall responsibility for the publicly funded work on pilgrimage in Norway and particularly for the approved routes.

Vennbahn adopts a more overtly commercial approach and the operators involved are larger units, less dependent on the cycle path for visitor volumes. Thus, the branding is currently less widely adopted; however, the project was only launched in 2013. The brand identity is heavily used on all promotional materials, on signage, hire cycles etc.

### Destination Packaging: Switzerland Tourism and Partners

Key branding considerations include;

- ST does not actively encourage the industry to use their branding, although the whole sector is allowed to use the 'Golden Flower' to strengthen the brand Switzerland. The only company that is using their branding is STS.
- STS uses the same brand for incoming tourism as ST – the golden flower of Switzerland because it is well known and recognised, but instead of 'Switzerland, Get Natural', they use 'Switzerland, by Train, Bus and Boat'.

### Food and Drink Experiences, Margaret River, Australia

The Margaret River food and drink case study isn't directly applicable to the Great West Way however its work on branding provides some learning which it is useful to consider:

- Although still comparatively new to market, creation of the "Your Margaret River Region" brand has presented a new unified brand proposition. This has been particularly successful in the respect that it has been taken up by tourism sector businesses and food producers/growers.
- Global distribution of Margaret River wines provides a shop window for extending reach of the new brand.

Strong strategic alignment with state and national agencies - positioning food and drink as a key pillar of local, regional and state tourism marketing. Tourism Australia's prioritisation of food and drink as a leading component of national marketing has provided real benefits for Margaret River – providing the ability to leverage a significantly larger market reach.

### Experience Development Programme: Canadian Signature Experiences Collection

The Canadian Signature Experiences® (CSE) collection is a qualified inventory of Canadian visitor experiences that best exemplify Canada's tourism brand. The role of the collection is to capture the attention and imagination of consumers around the world to entice them to visit Canada now. Canadian Signature Experiences® collection was launched in 2011 by Destination Canada. The programme recognises the market demand for experiential travel

and is a qualified inventory of experiences that deliver internationally on Destination Canada's *Canada Keep Exploring* brand promise.

Today there are 186 members offering saleable visitor experiences across the country that encourage visitors to venture off the beaten tourist path and *dive deeper into Canada's natural environment and/or authentic, local culture*. These experiences are designed to provide a series of memorable travel activities, revealed over time, that are inherently personal, engage the senses and make connections on an emotional, physical, spiritual, intellectual or social level<sup>1</sup>.

This brand alignment and market development programme has clear objectives to:

- Help change international travellers' perceptions of Canada, broaden the view of what Canada has to offer as a destination, and generate increased demand for export-ready experiences that align with visitor interests as identified through the EQ research;
- Stimulate a sense of urgency to travel to Canada and a greater level of push-through on the consumer path-to-purchase by showcasing compelling Canadian experiences in Destination Canada's marketing, media and sales activities;
- Meeting the mandatory criteria for the programme ensures that the applicant is export ready and has a viable and authentic experience to offer. To be eligible a company must:
  1. Deliver a travel experience that meets the definition of a Canadian Signature Experience;
  2. Have been in operation for a minimum of two years, delivering travel experiences;
  3. Have a website with a clear call to action for sales;
  4. Do business internationally, or be actively invested in targeted international marketing activities in one of Destination Canada's target markets;
  5. Be working with the travel trade and meet the nationally accepted export-ready criteria;
  6. Be the owner, provider and deliverer of the travel experience, and the point of sales for customers; and,
  7. Have rights-free, high-resolution images of the proposed Signature Experience.

While the Canadian example is a strategic experience development programme, it is relevant to the Great West Way in the sense that it provides an example of a programme that brings new high quality visitor experiences to market. Learning include:

### **Brand Aligned Innovation**

- The collection has encouraged brand aligned innovation within industry and has promoted the philosophical shift away from selling products and activities toward developing and delivering unique and memorable experiences at a relatively limited cost – essentially the cost of time to administer and oversee the programme. These experiences now differentiate Canada in the marketplace, help create the 'movie' of Canada in the mind of the traveller and are the basis of more meaningful destination experiences.

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<sup>1</sup> Destination Canada, 2015, *Canadian Signature Experiences Collection Application Guide* (update)

### **Trade-Ready Experiences**

- From the travel trade perspective, the CSE collection is a valuable sales tool and is used extensively by receptive tour operators in building itineraries. Indeed, in many ways it is the activities of the travel trade and media that are now driving the programme. The challenge is to ensure that these activities associate the member badge with the qualified experience rather than with the company or business.

### **Creating New News for Media**

- Similarly, the collection has proved to be an asset to the DMOs in developing travel trade and media familiarisation trips. Furthermore, while not designed to have a geographical emphasis, the collection has assisted in enhancing the differentiation of provinces such as Saskatchewan where three of the six experiences relate to ranching. This has enabled the province to further leverage this competitive distinction in its related trade and marketing activities.

## **3.2 Route Signage and Wayfinding**

### **Touring Route: Wild Atlantic Way, Ireland**

Fáilte Ireland has taken a comprehensive approach to route wayfinding – delivering a fully branded touring route. During identification of the Wild Atlantic Way route, several existing viewing points and lay-bys were identified and branded as Wild Atlantic Way candidate Discovery Points. All the candidate Discovery Points were existing car parks or laybys – which are located on long-established touring routes. These locations have been subjected to long-term use, management, maintenance and development, both historically, recently and some is ongoing.



#### **Physical Signage and Interpretation**

The route itself and 161 Discovery Points and Signature Discovery Points have been branded through the provision of directional signage and the production of accompanying maps, a website and an app. The installation of Photo Points and Interpretation Story Panels at each of the 188 Discovery Points along the Wild Atlantic Way was complete in time for the 2016 visitor season. The intent is to give visitors a sense of the local stories and encourage greater engagement and dwell time which will contribute to local economies.

#### **Signature Discovery Points**

Fáilte Ireland has provided 100% of the resources for implementation of wayfinding and signage infrastructure, with councils responsible for implementation in their respective

regions. Investment has been significant - over €12M in capital infrastructure along the route to date (not solely signposting)

### **Wild Atlantic Way App**

The app has been designed as a destination information tool – at present it does not incorporate booking functionality.

Key learning for the Great West Way includes:

- Wild Atlantic Way implementation incorporates a comprehensive wayfinding approach involving physical signage and interpretation, traditional print – maps etc., and dedicated consumer website and app
- Physical signage and interpretation was viewed as essential – as a means of delivering the brand and aiding visitor orientation/ management
- Effective partnership between Fáilte Ireland and councils along the route has been crucial to ensure consistent application of physical signage.
- Fáilte Ireland's ability to resource implementation is a gamechanger – implementation (at least, at the same speed) would have been unlikely.

### **Touring Route: Queensland Drive Tourism Programme, Australia**

One of the strengths of the Queensland programme has been the strategic approach taken to route infrastructure, including standardisation of policy where appropriate. Highlighted issues include;

#### **Comprehensive Approach to Route Infrastructure**

- A Queensland Camping Options Toolkit was developed - the toolkit was designed to help local governments determine their approach to camping options (fee structure, licencing, the areas where parking is allowed etc.) — one which reflects their unique circumstances and community aspirations.
- As part of our commitment to growing drive tourism, a Best practice guide for roadside rest areas in Queensland was produced to help local governments and community organisations better design and manage roadside rest areas, promote driver safety and enhance the drive tourism experience. The guide was developed under the direction of the Roadside Rest Area Consultative Forum, which included representation from peak industry bodies, local government and relevant state government agencies.

#### **Signage Revitalisation**

- Queensland's drive tourism network provides a variety of different visitor experiences including international journeys, strategic touring routes; regional and local tourist drives, and suggested itineraries. There is currently a need to revitalise signage across Queensland's strategic touring routes, which were developed several years ago. A review of signage policies and guidelines is being undertaken to improve the effectiveness of tourism signage and make it easier for tourism operators to apply for tourism signage. This includes; commitments to review tourism signage committees and establish key contacts for the tourism industry to engage with on signage matters, and update signage on strategic routes. Physical signage complements website marketing, Queensland's holiday APP, marketing campaigns and locally available print and maps.



## Touring Route, Great Ocean Road, Australia

The Great Ocean Road is heritage listed and an iconic touring route of international significance. Scenic touring along the Great Ocean Road is one of the region's most popular visitor activities.

The route utilises a range of wayfinding techniques, combining physical signposting and interpretation with hardcopy print, social media content and other digital marketing activities.



As drive tourism is so significant to most Australian visitor destinations, a strength that is worth highlighting is the provision of formal lookouts offering photogenic opportunities at iconic visitor spots and landscapes. Interpretation and telling the story of the destination is very well done at these iconic visitor hotspots.





The regional tourism organisation recognises that to reinforce the region's status as an iconic touring destination, and to generate greater yield and dispersal, a holistic approach to signage is required. This involves the development of consistent and integrated signing, including way-finding and interpretive information, and safety signing throughout the region, particularly along the Great Ocean Road. This is critical to encourage safe driving behaviour (such as driving on the left side of the road), as well as encouraging visitor dispersal from the coast to hinterland areas. Signing should consider new digital technology and opportunities to interact and engage with visitors during their visit.

On a related topic, it is important to note the major challenges currently being faced in managing and maintaining the route. While Federal and State Governments have committed \$50 million over the five years from 2014 to 2019 to address neglected maintenance of the road, it requires an estimated \$20 million every year thereafter to maintain the required standard for its national heritage status. Most the Great Ocean Road's key infrastructure was developed many decades ago when visitor numbers were comparatively low and it has since failed to keep up with both residential and visitor growth.

While there is evidence that the self-drive market is growing as fast as or faster than the coach market, this presents equal challenges as more visitors arrive in even more vehicles. Similarly, high visitation to the 12 Apostles, combined with grossly inadequate facilities and visitor services, is resulting in a sub-standard experience at what is one of Australia's flagship destinations, particularly for international visitors. Issues include:

- Road congestion caused by heavy day trip traffic from Melbourne.
- High demand wayside stops along the Great Ocean Road, especially by independent travellers and coach tour visitors.
- The growth of roadside vegetation along the Great Ocean Road has in many cases denied travellers of ocean views. This issue requires ongoing maintenance.
- Most roadside pullovers were created decades ago and can no longer accommodate safe parking for travellers seeking a photograph or a short walk. Many are poorly maintained and inappropriately located requiring an audit of capacity, need and safety.

- The numerous government agencies involved in coastal and foreshore management further exacerbate the problem of inadequate infrastructure due to a lack of coordination and conflicting priorities. There is no single agency that determines or funds overall priorities so gaps and inconsistencies in key infrastructure remain. This outcome is most unsatisfactory for one of Australia's primary tourist destinations.

Planned action includes:

- Developing and implementing a Management Plan for the heritage-listed Great Ocean Road to maintain its standard as a world-class touring route. This Management Plan is a requirement of the heritage listing.
- Mitigating traffic congestion along the Great Ocean Road through appropriate road works and infrastructure.
- Establishing and implementing an integrated and consistent world-class road signage strategy throughout the region, to be implemented by state and local governments. Priority to be given to signing of the Great Ocean Road.
- Identifying suitable management strategies, including sites requiring additional pullovers, and identify appropriate maintenance regimes for roadside vegetation.
- Developing solutions to manage coach parking especially at visitor hotspots along the route.

### Cycling and Walking Routes: The Vennbahn Cycle Route, Northern Europe & Cultural/ Walking Route: St Olav Ways, Norway

#### St Olav Ways

Given the serious implications for walkers and cyclists of getting lost, particularly given the remote nature of much of the St Olav's way paths, both have treated wayfinding as critical.

The signposting of the St Olav Way pilgrim paths started in 1994 and since then more than 5000kms have been marked with the pilgrim logo. They adopt several platforms for wayfinding: online maps which can be downloaded, GPX, and physical signage.



The most popular of the 6 pilgrim trails ending at Trondheim is the 643kms/32 days, Gudbrandsdalen path. This has 6 pilgrim centres located along the route and these are essential for community engagement on such a lengthy route. Much of the initial wayfinding and its ongoing maintenance are carried out at a local level by volunteers. Guide books remain popular despite high adoption of smart technologies in Norway.

#### Vennbahn

In contrast, the Vennbahn has been developed by a consortium of 12 local authorities – a mix of economic development agencies and roads departments. The cycle trail stretches

125km from Aachen in Germany, through east Belgium ending in Luxembourg and signage and wayfinding has been delivered by the authorities. Mapping is provided on the website and app, and hard copy maps and guidebooks are sold including a range of maps describing the feeder routes which help provide mass and scale to the project. The feeder routes do not carry the Vennbahn branding.

### 3.3 Governance and Stakeholder Support

#### Touring Route: Wild Atlantic Way, Ireland

##### **Governance**

Wild Atlantic Way has been developed by a dedicated programme team within Fáilte Ireland - a core team of 19.5 FTEs engaged in developing and delivering the programme.

Through the development stage, a range of constructive partnerships have been established at national, regional and local levels, which have delivered results during the early stages of the Wild Atlantic Way initiative, including the development and launch of the brand proposition, the identification and branding of the route, and the identification of existing experiences and offers which are 'on-brand'. There is already a strongly committed group of Local Authorities, state agencies and destination and trade groups within the western counties and this needs to be built upon and strengthened in order to make the Wild Atlantic Way a success for all. Engaged parties include:

- National and local tourism development organisations and marketing bodies
- National developmental, cultural and environmental agencies and organisations
- Local Authorities
- Local tourism operators and/or tourism representative associations
- Regional development organisations, Leader Companies and Local Enterprise Offices
- Culture and heritage organisations
- Non-tourism organisations, farming bodies and Chambers of Commerce
- Education and training institutions
- Local community groups.

##### **Stakeholder Engagement**

As full implementation of the route has proceeded from 2015 onwards, the implementation challenge has become apparent. Structural changes in Irish tourism have resulted in the removal of regional tourist boards, leaving national delivery – Fáilte Ireland and Tourism Ireland, and County Councils/ local tourism organisations at local level.

Although the response from businesses has been positive, to fully engage with businesses and communities at local level, it has been acknowledged that further work is necessary.

For the objectives of the Operational Programme to be achieved, collaboration between stakeholders is necessary at all levels: national, regional and local. At its heart, the Wild

Atlantic Way is a rich collection of destinations, each sharing and trading under the Wild Atlantic Way brand, while taking pride in the quality, character and distinctiveness of their own local area. These destinations are at various stages of their life cycle; some are mature and well-established with an excellent range of visitor experiences on offer, while others are at an earlier life-cycle stage with poor basic tourism infrastructure and services. In addition to working to enhance constructive collaboration between these destinations, the Operational Programme will also seek to identify an appropriate response to the tourism development needs of destinations, depending on their life-cycle stage, to ensure the responsible development of tourism within the communities all along the Wild Atlantic Way.

Collaboration among tourism businesses and relevant state agencies is also the key to unlocking the sales potential of the Wild Atlantic Way. The 2015-2021 Operational Programme sets out proposals for a range of implementation partnerships at community, county, regional and national levels. Actions include;

- Devising a Partnership Strategy with stakeholders and partners, ensuring an integrated national co-ordinated approach to implementation of the programme and protection of the environmental resources along the route.
- Establishing a Wild Atlantic Way stakeholder group/ partnership comprising several key national agencies, Departments and Local Authorities to advise on the sustainable development of the Wild Atlantic Way. This group will be led and managed by Fáilte Ireland as brand managers of the Wild Atlantic Way.
- Establishing partnerships at national and regional levels with the relevant environmental and heritage bodies to ensure the protection and responsible promotion of the core environmental and heritage assets upon which the Wild Atlantic Way is based.
- Establishing zones/ cluster networks comprising key stakeholders, trade partners and community interest.

Fáilte Ireland is currently in the process of developing experience development plans for regions along the 'Way'– the first (the Skellig Peninsula) has recently been completed. These plans spell out roles and responsibilities for national regional and local agencies.

Key learning for the Great West Way includes:

- Wild Atlantic Way has been developed as a national initiative - as such, initial development has been 'top-down' to a significant degree. Strong leadership and financial backing from Fáilte Ireland to drive the project was essential. A core team of 19.5 FTEs supports programme implementation.
- While nationally led, development and implementation has required Fáilte Ireland to engage with a wide range of partners including; environmental, cultural and heritage agencies, local government, business support providers and local communities.
- Local level engagement is important. Ten years ago, Ireland absorbed the regional tourism organisations into the national tourism agency (Fáilte Ireland). A gap emerged between FI and tourism businesses. Now FI is seeking to engage businesses in visitor experience development plans at the local level. An inference for Great West Way partners is that to ensure longevity and sustainability, the concept needs to be sold to

businesses at an early stage, particularly if the concept will rely on partnership or co-op marketing funds.

- Full implementation requires active business engagement at local level, which is difficult for a national agency. In Ireland's case, some new local/regional tourism structures are likely to be required to facilitate this engagement.

### **Touring Route: Queensland Drive Tourism Programme, Australia**

#### ***Legacy of Effective Governance***

When Queensland's strategic driving routes were established, clear structures were set up, many of which persist. Key aspects included:

- Establishing route committees consisting of relevant State Government agencies and departments, local governments and tourism agencies. A key aspect was setting up formal financial agreements/ memoranda of understanding which committed local governments along the route to work with partner agencies
- Route committees were established as key co-ordinating forums.

#### ***Ongoing Collaboration and industry engagement***

Continued success for drive tourism hinges on effective partnerships between industry and local government, which support a coordinated approach to the development of drive tourism across the state. These partnerships remain integral in supporting the delivery of objectives and include the following:

- The Queensland Tourism Industry Council (QTIC) Drive Alliance continues to work with government across several drive initiatives, including the touring route signage across the state's strategic touring routes, naming conventions for touring routes and chairing the first touring route forum.
- The partnership agreement between the Department of Tourism, Major Events, Small Business and the Commonwealth Games (DTESB), QTIC and the Department of Transport and Main Roads (DTMR) is fundamental to the ongoing delivery of drive and transport-related projects.
- The Queensland Touring Routes Inter-Departmental Committee is working to progress several initiatives relating to touring routes, including the ongoing rollout of the signage revitalisation project across the state's strategic touring routes.
- The continued collaboration between Queensland Government agencies ensures a whole-of-government approach to drive tourism.

### **Touring Route, Great Ocean Road, Australia**

As noted in the previous sections on branding and route signage, there are various governance and partnership issues which are potentially relevant to the Great West Way;

### **Regional Tourism Organisation Geography**

- The recently formed regional tourism organisation – Great Ocean Road Region Tourism Ltd has responsibility for the destination and covers the clear majority of the touring route, providing opportunities for more effective advocacy and co-ordination.

### **The Challenges of Multiple Jurisdictions on Linear Routes**

- In common with many touring or driving routes, the Great Ocean Road covers several local government areas and relies on a range of State and Federal government agencies for elements of its maintenance. In its Master Plan for the region Great Ocean Road Region Tourism Ltd with its partner agencies has committed to preparing and implementing a Management Plan for the route.

## **Cycling and Walking Routes: The Vennbahn Cycle Route, Northern Europe & Cultural/Walking Route: St Olav Ways, Norway**

### **St Olav Ways**

- The National Pilgrim Centre is funded by the Directorate for Cultural Heritage which in turn answers to the Ministry of Climate and Environment. It is a small, not-for-profit organisation constituted in 2014, which has formed a partnership with the Nidaros Cathedral and has overall responsibility for the publicly supported work on pilgrimage in Norway and especially for the approved St Olav routes. It is responsible for strategy, finance, management and marketing but most day-to-day activity is outsourced to local partners through the Regional Centres.

### **Vennbahn**

- The Vennbahn originated in the east of Wallonia, part of Belgium. The region had an increasingly popular network of rapid cycle routes known as RAVeL and given the route of the disused Vennbahn railway, the idea was to create a frontier route extending through 3 countries in the small area of Germany, Belgium and Luxembourg that share borders and significant history. This was greeted positively by the local authorities and regional partners and a partnership of key stakeholders was formed, formally coordinated by the German-speaking Community of Belgium (DG). It comprises 12 partners: local authorities and regional partners in Belgium, Germany and Luxembourg and was supported financially by two EU Interreg programmes. The partners are a mix of municipality roads/infrastructure departments and economic development agencies. The total investment for the project currently stands at about EUR14.5m.

## **Destination Packaging: Switzerland Tourism and Partners**

STS has regular meetings and tries to encourage partners to share their market knowledge and activities. They are invited to STS steering board meeting (with most important



shareholders) at which STS presents its marketing activities so they can in turn share with their own marketing departments. This communication between all parties is essential for everybody to consolidate their activities in an efficient way.

### **Food and Drink Experiences, Margaret River, Australia**

Several generic lessons from Margaret River's positioning and partnership work are potentially relevant:

#### ***Burgeoning Links between the Tourism and Food & Drink Sectors***

- Significant work has gone into delivered shared benefits – examples include; regional tourism organisation membership options than provide options for all businesses (tourism and food and drink businesses), sharing wine volume sales and visitation growth as co-outputs in a funding programme and building supply chain/ buyer & seller linkages. Similar principles can apply to the wide-ranging partnerships which would be necessary across the Great West Way's geography.



## **Alignment**

- The Margaret River region has been able to fully benefit from partnership benefits through ensuring that strategic priorities are aligned. The regional tourism organisation's MOU with the South West Development Corporation is especially illustrative - wine industry sales volumes are incorporated in the project alongside tourism outcomes. An inference for VisitWiltshire is the strategic partnerships which have been formed (heritage, environment, agriculture etc.) where mutual benefit can be accrued to build development and delivery of the brand/experience.

## **Regional Tourism Structures**

- Two local tourism organisations recently merged to form Margaret River Busselton Tourism Association – provided improved economy of scale opportunities as well as an increased depth of tourism products and experiences to promote to market. The increased scale of the region has helped in partnership formation and has reduced the potential for duplication in the marketplace. Membership structures also provide serve the needs of food and drink and tourism sector businesses.

## **Experience Development Programme: Canadian Signature Experiences Collection**

### **Partnership between National and Regional Levels**

- The decision to co-manage the collection with destinations has increased buy-in at the provincial and territorial level and has enhanced overall marketing alignment in the international markets.

## **3.4 Ticketing and Bookability**

### **Touring Route: Wild Atlantic Way, Ireland**

Developing online/dynamic booking solutions has not been a feature of initial stages of the programme – State Aid regulations made the addition of this type of functionality problematic and Fáilte Ireland felt that third party booking solutions are already available. The focus was placed on establishing the brand, ensuring core components of the route were in place, and working closely with international buyers/ tour operators.

Securing buy in and commitment from industry and travel trade has been a focus of Fáilte Ireland's work. While the Wild Atlantic Way programme does not seek to provide direct online booking solutions, significant resources have been directed towards ensuring take up of the 'Way' proposition by tour operators.

Fáilte Ireland's strategy is to support Irish tourism with a clear strategic focus on driving international bednights and revenue. To deliver on these strategic objectives, it is imperative to increase the awareness of the Wild Atlantic Way as an experience brand internationally. It strategy is based on:

- Equipping the domestic industry (sellers) to effectively up sell, and sell more bednights to the source international markets.
- Proactively engaging with distribution channels (buyers) by generating new leads and new niche markets.
- Creating new sales platforms that are focussed on business to business sales opportunities.

Fáilte Ireland has undertaken a range of business support and trade activities including:

- A range of business support programmes are available via Fáilte Ireland and Local Enterprise Offices - training programmes, webinars, toolkits etc.
- Support aims to equip the industry with market insights and competitor set analysis, and to facilitate networking between businesses to work together to develop, improve and protect 'Wild Atlantic' tourism experiences
- LinkedIn Wild Atlantic Way Trade Forum
- Trade Manual
- Active engagement with international buyers (grouping/ presenting Wild Atlantic Way experiences)
- An experience development programme is being rolled out for regions - experience development plans and implementation support - aiding businesses and destinations to develop the depth and quality of market-ready visitor experiences.

Looking to the future, Fáilte Ireland will seek to:

- Equip the domestic industry to effectively up-sell, and sell more Wild Atlantic Way product and offerings to the source international markets through a Sales Account Management process and other support mechanisms
- Engage with distribution channels and partners to generate new leads and new niche markets (e.g. Luxury, Adventure, Youth, Culture) to work with them to feature the Wild Atlantic Way in their programming or to increase their distribution share of programming
- Establish new sales platforms that are focused on business to business sales opportunities (involving pre-qualified participants) and deliver effective sales opportunities
- Present new saleable visitor experiences to new and existing intermediaries
- Develop the capability of the trade to design, deliver and cross-sell Wild Atlantic Way visitor experiences through insights identified through 'Path to Purchase' research
- Develop a strategy for regional dispersion along the Wild Atlantic Way to drive additional sales where there is under-utilised capacity whilst extending the season through the identification of new buyers.

Key learning for the Great West Way includes:

- Having a strong focus on trade engagement, linking sellers and buyers rather than development bespoke booking and ticketing systems

- Experience development is a focus - working with destinations to develop new saleable experiences which reflect and develop the Wild Atlantic Way proposition - a series of regional experience development plans will be developed over 2016-2018 to guide this work
- Support from mainstream business support agencies has been developed, as part of the overall support package.

#### **Touring Route: Queensland Drive Tourism Programme, Australia**

Dynamic ticketing and bookability do not feature as common parts of Queensland's driving routes - interactive and thematic itineraries linked to key experiences are presented, however as the routes are primarily self-drive, bookability functionality tends to be limited.

#### **Touring Route: Great Ocean Road, Australia**

The regional tourism organisation's consumer website provides a booking solution for accommodation but this does not extend to cover packaging around tours and itineraries. Itinerary options themed around experiences are provided on the website, with tour options offered by private tour operators (member businesses of the RTO).

#### **Cycling and Walking Routes: The Vennbahn Cycle Route, Northern Europe & Cultural/ Walking Route: St Olav Ways, Norway**

The nature of long distance cycling and walking paths do not give rise to the need for tickets per se – public right of way giving free access is the norm. However, one of the critical success factors is the requirement for reliable, integrated public transport to reach the locations which become recognised as key start/finish points, and clearly ticketing is always part of the travel process. In terms of direct distribution, the key requirement for bookability is in reservations for accommodation, bike hire, transfer services for baggage and to a lesser extent trained guides. None of the walking or cycling projects reviewed provides online booking from their websites or apps, or link directly to online travel agents or 3<sup>rd</sup> party websites which could perform this function. They do however provide images and links to websites of suitable accommodation, some of which provide online booking. Unusually, in the case of pilgrim hostels there is a significant proportion of a walk-up arrival (or telephone on the day) and owner/hosts are generally very flexible in expanding their accommodation stock as best they are able, as needed. Indirect distribution is reliant on the working practices of the travel trade and increasingly the trend is towards online bookings. Most major operators such as Ramblers Walking Holidays, HF Holidays and Contours offer online booking for their domestic walking tours and activity/adventure operators are doing the same.

In the case of Vennbahn, a lead tourism agency offers tours which they operate in-house, as a way of proving the business case to the trade. This has been partially successful already, with one commercial operator now featured as a trade partner. Four packages are promoted on the Vennbahn website; three of these are operated by the central marketing agency for East Belgium and one is commercial. The call to action is traditional - telephone or email for bookings. Packages on the St Olav Ways are offered by a small number of

Scandinavia tour operators, and the National Pilgrim Centre arranges a large scale, public walk annually with participation of around 100 people.

### Destination Packaging: Switzerland Tourism and Partners

The integrated online booking system on Switzerland Tourism website (MySwitzerland.com) allows users to book hotels, apartments and holiday rentals, trains or combined public transport and leisure offers (art and museums, fun, sports and recovery). Bookings are paid for separately via the partners (for example STC, Swiss Air for flights, hotel rooms via Swisshotels.com, train tickets via Swiss Travel System, and the online leisure shop in collaboration with SBB Railway).

### Food and Drink Experiences, Margaret River, Australia

Margaret River is predominantly a self-drive destination. While typical of most Western Australian regions, this presented a challenge for increasing visitation, particularly in its key Asian growth markets. In response, MRBTA has been working in partnership with industry to offer a wide range of tour options and providing online booking functionality via [www.margaretriver.com](http://www.margaretriver.com):

- MRBTA has developed website booking functionality which allows consumers to book over 100 private, group or tailor-made tours (35 food and drink) - booking is not dynamic, but nonetheless provides a route to market for tour operators. It was considered that offering dynamic booking for tours was not a practical consideration
- Booking functionality powered by Bookeasy software solutions <http://bookeasy.com/>
- Trade/ tour operator engagement
- Stories and interpretation to drive consumer engagement
- A stories section of the website <https://www.margaretriver.com/stories/> has been developed, providing editorial/blog style content directly from the producers – the stories add an element of authenticity to presentation.

While none of these initiatives are ground-breaking individually, the overall presentative programme is impressive and professionally presented on the destination website – the emphasis has been placed on promoting existing tour options rather than developing bespoke new solutions for tour itineraries.

## 3.5 Innovations in Digital Presentation

### Touring Route: Wild Atlantic Way, Ireland

Fáilte Ireland has taken a comprehensive approach to marketing of the route. Initiatives include:

- [www.WildAtlanticWay.com](http://www.WildAtlanticWay.com) is the official tourism information website. It provides comprehensive information to inspire visit to Ireland's vibrant coastal route. It enables

visitors to virtually explore the route, assists with trip planning and offer the most up to date information

- The 'Get Inspired' section of the website – visitors are invited to select things to do by theme
- Browse Stories – for top tips, suggestions and insider knowledge from the people who know the Wild Atlantic Way best. Visitors can also add their own experience and share it with others
- Trip Planner – a tool to help consumers plan the perfect trip using pins to save trip ideas to an interactive map that can be edited printed or shared with friends
- Wild Atlantic Way App
- Creation of the Wild Atlantic Way passport in partnership with the Irish Post Office – a device designed to encourage visitor interaction, dispersal and repeat visitation.

Digital investment is embedded as part of overall marketing activity. Key features include:

- An initial international market focus, but now also being embedded in domestic marketing
- Investment in events as trip motivators - part of an annual €2-3M revenue budget
- Wild Atlantic Way integrated within overall Ireland marketing activity, leveraging large scale investment
- New €1m autumn campaign - 'Embrace the Wild Atlantic Way of Life' launched in September 2016, with a shoulder season focus and targeting domestic audiences.

It is unclear whether the overall body of work would be classed as innovative, however, marketing is certainly of a high standard and underpinned by a range of high quality imagery.

#### **Touring Route: Queensland Drive Tourism Programme, Australia**

Many of today's drive travellers are becoming increasingly tech savvy and more reliant on technology including smartphones, notebooks and tablets. They are using this technology to plan their journey, including researching tourism experiences or events, to capture their experiences and to communicate with family and friends during their holidays. Recent international research shows 83% of leisure travellers and 76% of business travellers plan their trip online.

Looking at other information technologies, research suggests that devices such as QR codes have had limited take-up. Research by the Digital Industry Association of Australia (2014) found only 17% of all respondents used a QR code in 2013, this figure was lower than in 2012.

Push technologies such as iBeacon (Apple) and Cooltown (HP) use Bluetooth technology to 'push' content to users who have downloaded an App that seeks the signal and registers within 300m. Tourism and Events Queensland has recently rolled out 80 iBeacons and have

70 more rolling out, with over 4,000 downloads of their App which also brings together the Visitor Information Centre Network along with tourism database content.

The development of Apps for touring routes is a popular option, particularly where mobile coverage is poor as Apps can still be deployed. However, download numbers and user feedback on most routes Apps, including the Great Ocean Road and the Heritage Highway (around 500-1000 downloads since 2013), shows limited engagement. While there is demand for offline en route information including opening times and accommodation options, current App solutions provided by other touring needs do not seem to meet user needs.

## Cycling and Walking Routes: The Vennbahn Cycle Route, Northern Europe & Cultural/Walking Route: St Olav Ways, Norway

Mapping and location-based information has an almost unlimited potential when it comes to design and development of websites and apps. Given that mapping is at the heart of most of the trail based visitor experiences, it is surprising in some ways that the projects reviewed have not been particularly innovative, but focus on directional tools, search and proximity to attractions, visitor information (e.g. parking, rail and bike, bus shuttles) accommodation or to report a problem such as damaged track.

Vennbahn does make use of storytelling on its app, which is an innovative addition to the visitor experience and reflects the often turbulent history of the border area. As well as the actual map, there are missed opportunities to use tools to help with monitoring throughputs or data use, offering discounts and added value offers, for gamification (e.g. quizzes and treasure trails) or to compare with others, to help users find like users and so on.

St Olav ways has dropped their app, and concentrated on a responsive website in part because mobile coverage is good for most of the routes reducing the need to download maps in advance and use them offline in an app when on the route. Updating their website is a straightforward task, which allows them to keep the information up to date – important given prevailing weather conditions. Their website includes a good facility to create and store your own trip, tailored to your interests, preferred distance to travel and choice of accommodation. They also make extensive use of Instagram and Facebook.



### 3.6 Environmental Assessment

#### Touring Route: Wild Atlantic Way, Ireland

Fáilte Ireland aims to ensure that 100% of the direct and indirect environmental effects of Wild Atlantic Way initiatives and actions are fully assessed to the satisfaction of competent authorities/agencies, the public and visitors.

The sensitive nature of the route's environment was a key consideration from the outset – approximately 75% of the route has environmental designations of varying types. Parts of the route such as the Cliffs of Moher are under significant visitor pressure – attracting over a million visitors per year, while other parts of the route only attract modest visitor numbers.



A comprehensive environmental assessment/audit was carried out to inform route development and environmental impact remains a key part of overall monitoring. Protecting and enhancing the asset base is a high-level goal for the overall programme, and a commitment is in place to review the route in 2017 – this review will in part be informed by ongoing environmental monitoring.

From a social and cultural perspective, a significant amount of work has already been done with communities, particularly by the Local Authorities and the Heritage Council, to identify, record and explore this heritage. Fáilte Ireland, in collaboration with the Local Authorities, the Heritage Council, the Department of Arts, Heritage and the Gaeltacht, the Office of Public Works (OPW) and the National Parks and Wildlife Service (NPWS), among other agencies and organisations, intends to build on and continue this work through a series of community based projects, to explore a new understanding of these indicators of place, for example local building styles, farming systems and food culture. This will involve highlighting and celebrating the variations in cultural life along the Wild Atlantic Way, including such practices as building traditions (types of houses or drystone field walls, for example), Irish language (dialects, songs, place names, literature in Irish), mythology (such as that connecting Mount Brandon, Mount Callan and Croagh Patrick), fishing practices (traditional boat types, seafood culture), music (those characteristics that distinguish Clare music from Sligo or Kerry traditional music), etc. The aim of this approach is to create a new consciousness of Irish Atlantic culture both in Ireland and internationally through the Wild Atlantic Way.

Specific actions in the 2015-2019 Operational Plan include:

- To promote the Leave No Trace principles to both visitors and tourism providers
- To promote responsible tourism practices among tourism providers and to encourage them to pursue green certification as appropriate
- To encourage the retention of all existing Blue Flag beaches and the designation of further Blue Flag awards along the Wild Atlantic Way
- To support and promote An Taisce's Clean Coast initiative at beaches along the Wild Atlantic Way
- Fáilte Ireland will continue to contribute to the Burren and Cliffs of Moher Geopark LIFE Project and to the Aran LIFE Project and draw best practice from them. In association with the other LIFE Project partners, Fáilte Ireland will look to apply the lessons learned from these LIFE projects to other parts of the Wild Atlantic Way.
- To support responsible development practices by stakeholders through the preparation of guidelines for Local Authorities and other stakeholders on the consideration, design and management of new and existing visitor initiatives.
- Undertake regular monitoring of key indicators at settlements and key environmental sensitivities to provide timely and prior notification of emerging adverse effects [if any] so that these can be addressed to avoid deterioration of environmental assets.
- To proactively promote and increase awareness and understanding of evidence based best practice approaches to the management of tourism along the Wild Atlantic Way, and the wider regional catchments along the route.



Key learning for the Great West Way includes:

- Social and environmental considerations were a core part of the programme from the outset – Fáilte Ireland has fully embraced this as part of programme delivery.
- Development of the route has had a positive impact in the sense that it has heightened attention on the quality and special nature of the environment - Fáilte Ireland has embraced the environmental and social aspects to project development and delivery – a key part of the Wild Atlantic Way proposition is that the Wild Atlantic Way remains 'wild'.

### **Touring Route, Great Ocean Road, Australia**

The Great Ocean Road has existing for nearly 100 years. As such, formal environmental assessment was not part of its development.

However, the road runs along a sensitive coastal environment and has widely acknowledged challenges with road congestion and maintenance. This part of Australia is also susceptible to bush fires therefore environmental assessment is now an important management component.

Social sustainability is also an issue recognised in the region's Master Plan. The impact of increasingly large visitor numbers on small communities along the Great Ocean Road is of major concern and requires a new approach to address the problem. The region's tourism Master Plan actions include;

- Engaging with local communities and local government to identify visitor impact issues and develop a range of strategic initiatives in response.
- Developing and implementing a regional and local communications strategy to inform residents about the contribution of the visitor economy to local jobs and services.
- Continue to involve community representatives in the development and implementation of Destination Action Plans.

### **Cycling and Walking Routes: The Vennbahn Cycle Route, Northern Europe & Cultural/Walking Route: St Olav Ways, Norway**

Although there is no formal audit of environmental impact published or made available to us by either Vennbahn or St Olav Ways, it almost goes without saying that non-competition users of cycle, walking or paddling trails have some level of interest in the natural environment.

#### **St Olav Ways**

In Norway, outstanding scenery is a given in most of the country and the impetus behind the pilgrim route development was the exploitation of the significant cultural heritage, including but not restricted to churches. These were often built of (long lasting) stone in contrast to (shorter-life) timber which has been the predominant construction material since medieval times; they are therefore of considerable heritage interest as well as offering religious

importance to some and a wider spiritual importance to most. St Olav Ways have also been planned to contribute towards the wider enjoyment of local food and drink. 2014 research of 600 walkers revealed that the primary reason for walking was "nature" (80%) followed by "history/cultural heritage", then "reflection and spirituality".

### **Vennbahn**

Vennbahn is a greenway, and reflects a philosophy of slow tourism in natural surroundings; mainly (but not exclusively) traffic free. It is non-challenging cycling (2-3° along its length) but travel is through varied landforms giving local interest. A junction system allows users to explore side routes and these may be of more interest to mountain bikers or road specialists. Use of public transport is encouraged with options including rail/bike and shuttle buses to return users to their start point.

## **3.7 Impact of the Case Study Projects**

All the case studies reviewed have demonstrated success to greater or lesser degrees, although with destination level outcomes, access to data which relates directly to the activity is limited. Wild Atlantic Way's Operational Plan provides a comprehensive set of performance measures as an exemplar – hard data on its performance is limited so far, however anecdotal feedback is positive. Availability of impact information from the case studies varies, however some common themes are apparent.

Many of the case study projects reviewed are long term initiatives - potentially best served by KPI programmes which include short-term direct outputs (i.e. ROI on marketing campaigns, stakeholder participation/engagement, accommodation occupancy levels etc.) as well as longer term outcomes such as perception change (measured longitudinally in visitor surveys) or visitation/expenditure targets.

### **Touring Route: Wild Atlantic Way, Ireland**

The Wild Atlantic Way is still a relatively new experience - only being in market from 2015. Although hard visitation data is limited at present, good progress has been made on establishing the programme. Hard statistics are limited at present but impact to date includes:

- Brand awareness by international visitors is the key Fáilte Ireland measure – through its brand tracker survey, initial research indicated awareness of 7% from intenders/those interested in taking a trip to Ireland. Although a relatively low number it is important to note that the Wild Atlantic Way is an entirely new proposition only just brought to market - Fáilte Ireland has a target of generating 20% awareness
- Excellent response from businesses along the route – anecdotal evidence of unsolicited approval and positive feedback regarding the Wild Atlantic Way proposition
- Anecdotal evidence of new businesses and experiences using Wild Atlantic Way in business names and marketing - Fáilte Ireland are monitoring take up
- Positive engagement by tour operators - amending their itineraries and routes to incorporate or lead with Wild Atlantic Way descriptors and terminology. Given the scale

of the overall programme, measurement and monitoring is extensive, with the current operation plan providing for major review points during 2016 and 2017. The VICE model provides the basis for impact monitoring. High level programme objectives are as follows:

Category	High Level Goals	Measures and Targets
Visitor	Satisfy and engage visitors	Keep the satisfied/very satisfied percentage at or above 90% for the key factors.
	Grow paid bednights	Increase paid bednights from overseas and domestic markets
Industry	Increase industry earnings	Grow tourism earnings from both overseas and domestic markets
	Strong stakeholder engagement	Increase meetings and participation of main stakeholders and partners,
Community	Satisfy and engage locals	Ensure that locals feel engage and consulted
		Ensure that locals feel that tourism benefits them and their locality
	Increase employment	Grow tourism jobs
Environment	Protect and enhance asset base	Monitor the condition of the built and natural environment.

Source: 2015-2019 Wild Atlantic Way Operations Plan

In developing the evaluation and monitoring framework it was determined that focussing on paid bednights rather than visitor numbers has several benefits, about the environmental impact of the programme:

- The objective of growing length of stay rather than number of visitors has a softer impact in environmental terms
- Increased length of stay in the context of a touring route will lead to a better geographic distribution of visitors
- A better seasonal spread of bednights can mitigate congestion of key locations during peak months.

### Project Milestones

- Wild Atlantic Way launched in Spring 2014
- €12M invested in tourism capital infrastructure along the route
- Investment of €1.5 million in Festivals & Events in 2014 & 2015
- Route signed from Inishowen Peninsula in Donegal to Kinsale in West Cork
- Fully dedicated consumer and trade website [www.wildatlanticway.com](http://www.wildatlanticway.com) launched in Spring 2015
- 188 Discovery Points along the route including 15 Signature Discovery Points

- International and domestic advertising campaigns to raise awareness
- Wild Atlantic Way Operational Programme 2015-2019 published
- Over 800 journalists from 20 countries have been hosted
- Hosted Adventure Travel World Summit (ATWS) 2014 in Killarney
- Hosted Wild Atlantic Way Expo 2015 in Galway with 60 international Adventure & Youth buyers
- Wild Atlantic Way app launched in Summer 2014
- Developed 100+ Wild Atlantic Way visitor experiences in partnership with tourism businesses in 2015.

### **Awards & Accolades**

- Best Tourism Initiative 2014 - Chambers Ireland
- National Impact Award – LAMA Awards 2014
- Best Tourism App - Appy Awards 2014
- President's Prize - Irish Landscape Institute Awards 2015
- Best in Digital Geography & Location-based Services – Eir Golden Spider Awards 2015
- Best in Travel Sport Leisure & Tourism – Eir Golden Spider Awards 2015.
- Irish Planning Institute National Awards 2015 – Winner Tourism & Economic Development category.

### **Key Learning**

- The programme incorporates a comprehensive set of performance measures, with resources provided for appropriate monitoring
- The scale of the project means that a medium to longer term perspective also needs to be considered in terms of outputs and outcomes.

### **Touring Route: Queensland Drive Tourism Programme, Australia**

Drive tourism continues to be a significant part of Queensland's visitor economy. Recently research was commissioned to find out more about tourers due to their longer length of stay and higher number of stopovers. The findings from this research include:

- Tourers directly contribute approximately \$1.9 billion to the Queensland economy per year: \$1.2 billion for domestic and \$737 million for international tourers
- Touring supports approximately 15,000 jobs annually (or 12 per cent of all tourism jobs) in the state
- 950,000 domestic visitors tour Queensland by road (6 per cent of all domestic visitors) and 360,000 international visitors take to the road (18 per cent of all international visitors to Queensland)

- Domestic tourers spend an average of 11.8 nights in Queensland and spend an average \$113 per night and
- International tourers spend an average of 26.4 nights in Queensland and spend an average of \$76 per night
- Specific research on the impact of individual routes is not available at present.

#### **Touring Route, Great Ocean Road, Australia**

The region is one of Australia's premier tourism regions – led by the road itself, the region offers a high-quality range of nature based, cultural and activity experiences.

The region attracts over 5 million visitors per year. Tourism Victoria reported that in 2012/13 the direct economic impact of visitor spending was responsible for 6.1% of the Great Ocean Road regional economy (share of gross regional product). As such, the Great Ocean Road region is well above the regional Victorian average (4%) for its dependence on the visitor economy.

#### **Cycling and Walking Routes: The Vennbahn Cycle Route, Northern Europe & Cultural/ Walking Route: St Olav Ways, Norway**

Both Vennbahn and St Olav Ways are regarded as successful new products that are having a range of positive impacts.

##### **St Olav Ways**

The longer established St Olav Ways has seen considerable growth in footfall, so much so that one of the interviewees regards carrying capacity as a challenge for the near future. The international reputation of Saint Olav Ways has grown markedly and numbers of walkers along the trails have been increasing by around 20% - 30% annually, although numbers remain small. The overall number of pilgrims is currently 10 – 12,000 per year, varying from those on 1-day excursions to a 6-week end-to-end journey. As is often the case with long distance walks, people tend to walk St Olav Way routes in stages from 3 to 14 days, and return over time to complete the task. The long-term target is to distribute 42,000 'St Olav letters' (proof of a completed pilgrimage) in 2030, with an economic impact of 700m Krone (around £67million.)

##### **Vennbahn**

The official inauguration of Vennbahn was in 2013 and more than 200,000 cycle trips were recorded in the 2014 peak season between June and October. In 2015, the overall number of recorded cycle trips was 354,300 which have resulted in occupancy rate in the regions increasing by up to 20%. The number of the Vennbahn's own cycling packages sold almost tripled between 2013 and 2015, and there are currently active tour operators in Belgium, The Netherlands and Austria. The return rate is higher than expected as the region is found to be more attractive and offer more interest than expected.



The Vennbahn Cycle Route has won international recognition and a series of awards in 2013, 2014 and 2015 including "Cycle Route of the Year 2014" from the RAI Vereniging (Holland's association of bicycle and automobile manufacturers and importers).

### Destination Packaging: Switzerland Tourism and Partners

Overall, impact of partners' work in destination packaging has delivered tangible outcomes, including:

- The number of visits to MySwitzerland has been steadily increasing year by year, reaching 27m in 2015
- STS does not handle booking itself but is set a goal by its shareholders of revenue to be achieved through the sale of Swiss Travel Passes by distribution partners. The more revenue STS produced through its distribution partners, the more successful STS is considered to be. Revenue has increased by over 40% since 2010 when STS AG was founded
- STC is an SME, so its turnover is small in relation to the Swiss economy. However, STC appears to have increased turnover every year, most years also with positive net earnings. The company was subsidised in the early years, but stood on its own feet from 2005 onwards, though performance has varied according to market / trend changes.

### 3.8 Critical Success Factors/ Must-Dos

#### Touring Route: Wild Atlantic Way, Ireland

Several common themes are apparent:

##### **A Strategic Approach**

- Wild Atlantic Way is fully embedded within a strategic experiential approach at national level – one of three core propositions critical to the success of Ireland's tourism industry. The initiative benefits from a comprehensive monitoring mechanism and strategic management/operations plans.

##### **Thinking Big**

- Neither half measures nor the status quo would achieve the necessary impact to address the challenges facing the tourism sector. Fáilte Ireland and partners have committed to a large-scale, long term programme. The potential market impact available from the depth and range of experiences incorporated within Wild Atlantic Way exceeds what could have been achieved by individual regions or council areas. A large-scale project

which seeks to disrupt or shift the market stands the best chance of achieving its objectives when integrated within the context of overall strategic tourism objectives. The Wild Atlantic Way being developed as a national initiative led by Fáilte Ireland ensured that this has been the case.

### **Strong Leadership**

- Strong leadership and financial backing from Fáilte Ireland to drive the project was essential. A core team of 19.5 FTEs supports programme implementation.

### **Route Spine**

- Although presented as a 'way' accessible via a range of transport modes, and the longer-term ambition is to create touring loops which provide options for cyclists and walkers, the core touring/driving route is at the heart of the proposition. After the brand was identified, the core road route (existing road network) or spine was identified to form the central 'experience' to be promoted.

### **Wide Ranging Partnership**

- While nationally led, development and implementation has required Fáilte Ireland to engage with a wide range of partners including; environmental, cultural and heritage agencies, local government, business support providers and local communities.

### **Brand-Led**

- The Wild Atlantic Way destination brand was developed with a specific objective to be a unifying proposition for the West Coast - a compelling proposition which had the potential to make the necessary impact in international markets.

### **Comprehensive Investment Approach**

- Establishing Wild Atlantic Way and bringing it to market has required a comprehensive investment approach covering; capital investment in wayfinding and route development/maintenance, marketing and branding investment, digital platforms, business support, experience development and partnership formation.

### **Trade Support**

- Securing buy in and commitment from industry and travel trade – while the Wild Atlantic Way programme does not seek to provide direct online booking solutions, significant resources have been directed towards ensuring take up of the 'Way' proposition by tour operators.

### **A Practical Approach**

- The Wild Atlantic Way is a largely a self-drive destination at present. The route has consciously been positioned as a touring proposition, with information on transport

options provided and walking/cycling options are being developed, however the project accepts the reality that the 'Way' is most readily accessible via self-drive or coach tours at present – initial investment has focused on improving the quality of this experience.

### **Touring Route: Queensland Drive Tourism Programme, Australia**

From the Queensland experience and destinations elsewhere in Australia there are several principles which can be applied to touring routes of varying types.

#### ***Sharing and Delivering a Cohesive Story***

- Via a brand strategy, developing an iconic look and feel for the Brand and a toolkit for industry and other stakeholders to use.
- Working with stakeholders to create a brand story or narrative for the route.
- Developing an interpretation plan that links the planned signage, lookouts, visitor centres, and points of interest along the route into a cohesive story.
- To reinforce the brand, ideally every business along a route would promote the route brand in every possible forum including their website. Success stories such as the Savannah Way have not only encouraged businesses to use the logo on their own product pages but some businesses have the logo on their entry sign, and others have renamed businesses after the route.
- Market research has shown that consumers need between 7-11 touch points to recall a message or brand. The best journeys have an inspiring story that connects the route and the people who live along it. The Matilda Highway (Qld) draws inspiration the Banjo Paterson poem, the Great Ocean Road the story of the road builders and the seafarers; the newly created Wild Atlantic Way tells the story of the land holding back the ocean. These epic themes of heroism, struggle and wanderlust, create emotional engagement with the visitor and allows them to give meaning to places and things that go beyond just their appearance. An example of a touring route that failed to create a unique selling point is 'Australia's Country Way' linking Sydney and Rockhampton via the New England Highway. The theming has not been embraced by the customer, and the name New England Highway remains the better-known brand. Despite the interpretation panels along the route, the brand does not create a compelling market need
- Integral to delivering a cohesive story is getting industry to buy in to the story. To develop a successful touring route brand, there is a need to create a direct link between the products and the emotional experiences that deliver the brand essence. That is, operators need to be given the tools to deliver the idea of the touring route as more than just a road to their customers. This can best be achieved with a simple guide to the hero experiences of the route, how they can be translated into 'signature experiences' for a business and providing operator training and or mentoring to bring it to life using emotive language on signage and marketing materials that reflects the destination experience. An excellent example of where this has been achieved is Tourism Australia's National Landscapes programme and the mentoring programme on the Great Barrier Reef where the Hero Experiences were embraced by operators and showcased on social media with excellent results.

- To fully capitalise on the potential of touring routes, businesses must be fully engaged – if they aren't engaged at the outset, there is a danger that the route becomes 'The Tourist Board's job'. The ideal relationship is mutually beneficial - businesses developing unique experiences which a) leverage off route marketing and b) add value to the overall route experience.

### ***Consistent Signage & Collateral***

- Establishing a hierarchy of signage and usage of iconic signage (where appropriate, and within extant regulations)
- Removal of signage clutter and visual distractions from a route.
- Creation of a hierarchy of collateral which is rolled out across a route to bring the brand to life.
- Working with partners to deliver the message on the ground (including visitor centres, and en route safety messages).

### **Creating Iconic Moment: Lookouts & Road Infrastructure**

- Developing new infrastructure to showcase routes' best assets including lookouts, and layby upgrades. With stunning vistas, and the need to encourage visitors to 'just stop', lookouts can be a potentially impactful part of journeys.

### **Governance**

- Effective governance which formally commits partners along a route.
- Strong leadership has been critical in driving drive tourism initiatives forward and maintaining momentum.

### **Touring Route, Great Ocean Road, Australia**

The Great Ocean Road is an example of a high-profile destination which has a touring or driving route at its heart. Alongside the touring route, over several years, it has developed a high-quality range of complementary experiences. Relevant considerations for the Great West Way include:

- The formal naming of the road as the Great Ocean Road has insight been invaluable to building brand recognition and ownership – the entire region's tourism proposition has built up over several decades around this core proposition.
- Although the regional tourism organisation covering the route was only established in 2015, the increased ownership has already started to pay dividends in terms of improved ownership, accountability and advocacy. Although visitation has been increasing, growth in value of tourism has not kept pace with peer group domestic visitor destinations during the period that a regional tourism body was not in place. The Master Plan for the region sets out a clear strategic direction which had been lacking.

### **Cycling Route: The Vennbahn Cycle Route, Northern Europe**

#### **St Olav Ways**

- An authentic route, with high profile start and end points, supported by the natural environment and features of genuine heritage interest.
- Good maintenance and waymarking.
- Opportunities to interact with local people help to deliver authenticity, and provide a unique experience with a strong sense of place that is much valued by users.
- Getting the local farmers and small businesses onside, backing the St Olav Way. This has been vital. Developing small scale accommodation on farms has helped the sustainability of fragile rural enterprises and is aligned with the pilgrim principles.
- Relationship building with the local communities. The regional pilgrim centres, staffed year-round, have been game-changers in this respect.
- Involvement of volunteers to keep maintenance costs down.
- The provision of hostels at least every 25 kms.

- Churches open to explore and admire.
- Good mapping has resulted in users feeling safe.
- Regular resting points, encouraging people to take time out and enjoy the nature around.
- Extensive press and TV coverage. This has raised the profile nationally and internationally at low cost. The “wellness” and spiritual nature of the experience and the fact that is equally a cultural route as well as a physical challenge lends itself to media attention now.

### **Vennbahn**

- A wide-ranging partnership approach: Vennbahn was planned by a partnership that shared and bought in to a common objective. They planned for, and delivered an end-to-end project holistically despite the challenges of operating across borders.
- Attractive routes with clear themes and USP, well signed.
- Feeder routes or side-tracks that can provide a different terrain and landscape to the principal route.
- Effective branding and digital platforms: The distinctive yellow branding has been widely used along the length of the Vennbahn, adopted by a variety of service providers to create brand awareness and quality assurance. While the website and Social Media platforms would not be described as cutting-edge in tourism terms, they are effective and creative.
- Access to natural and cultural heritage assets: Vennbahn provides an opportunity to explore outstanding natural assets (the route passes through the High Fens/Eifel cross-border Nature Park, as well as cultural assets).
- Quality of the cycling infrastructure: A well maintained, high standard of surface, reasonably non-challenging, and largely traffic-free cycle paths or greenways. Safe tunnels and bridges. Resting places and picnic stops with views.
- Clear directional signage using a variety of delivery platforms: Everyone hates getting lost.
- Supportive public transport: Public transport provision must be targeted to the specific needs of the cycle user and provide the necessary linkages.
- Quality Standards: Setting and adhering to quality standards for the visitor and hospitality services along the route which ensures the provision of cycling friendly services. The bed and bike certification has been successful.
- Marketing and promotion: Up-to-date and easily accessible information and promotional tools.
- Good organisational support from trade bodies and agencies.
- Monitoring and evaluation: Usage monitoring and Impact assessment.

### **Food and Drink Experiences, Margaret River, Australia**

### ***A High-Quality Product as a Starting Point***

- The region offers a genuine depth and quality of food and drink experiences. In this sense, the Great West Way also has a ranging group of high quality visitor experiences.



### **A Signature Event**

- The Margaret River Gourmet Escape is a high-profile event that draws people to the region. The event is credited with providing the step change necessary to elevate awareness. The concept of a must-see experience or trip motivator applies equally to most destinations or touring routes.

### **Timing**

- Margaret River Gourmet Escape's instigation in 2013 has allowed the region to surf the wave of food and drink popularity - enabling the region to have a high profile in Tourism Australia's *Restaurant Australia* campaign. Similarly, if the Great West Way can tap into national marketing themes, this would offer similar types of benefits.

### **Alignment**

- The region has been able to fully leverage partnership benefits through ensuring that strategic priorities are aligned. MRBTA's memorandum of understanding with the South West Development Corporation is especially illustrative - wine industry sales volumes are incorporated in the project alongside tourism outcomes.

### **Adding Value**

- MRBTA's work on itineraries, interpretative stories and building distribution of tour options has started to add significant value. These characteristics would also potentially be beneficial in implementing the Great West Way.

### **Brand-led**

- The adoption of *Your Margaret River Region* branding across all aspects of tourism in the region, including marketing and signage, provides a common look and feel across products and a consistent regional brand message. Consensus suggests strong support for the brand.

## **Destination Packaging: Switzerland Tourism and Partners**

### **Successful Partnership and Collaboration**

The overriding success factor in this Swiss example is the successful collaboration between Switzerland Tourism, Swiss Railways SBB and the hotel associations.

- Switzerland Tourism's primary aim is to increase demand for Swiss tourist services. Thus the (indirect) triggering of a booking direct to the service provider is as good an outcome as a (direct) booking through the Switzerland Travel Centre. It is this openness which makes the ST/STC web platform fundamentally different from purely commercial travel sites
- Success in international marketing in markets such as China has been the result of working closely with strong local partners in these markets. STS's market managers visit the partners regularly, accompanying them for sale calls etc.

### **Website Development**

Switzerland Tourism has identified a series of 'must dos' in terms of website development:

- Adoption of clean, clear and efficient appealing, modern web design
- Focus on customer benefits delivering the essentials
- User-centred functions rather than rigid, complex structures
- Search instead of complex navigation structures
- Magazine and map view to provide inspiration
- Creation of ambassadors for Switzerland
- Sharing of everything on Facebook, Twitter, Instagram
- Adaption of design to the corporate design of Switzerland Tourism
- Integration of the Switzerland Travel Centre booking platform, with a high level of permeation between the ST site and the STC site.
- Access to information by geography or theme from the portal page
- Geographically-defined access leads to ever more specific, closely product-related destination or offer pages.

### ***Catalytic Impact***

- STC's ambition at the outset was to provide an online hotel and Swiss Rail Pass solution as well as offering contact centre services for Switzerland Tourism – it has been successful in this regard.
- STS's aim was to pool and purposefully direct marketing efforts outside Switzerland in order to promote Swiss public transport services abroad. In this regard the partnership promotes the publication of Swiss public transport services and has been instrumental in contributing to a sustained increase in revenue.

### **Experience Development Programme: Canadian Signature Experiences Collection**

The CSE programme has grown to almost 200 members and has had marked success in several areas:

- The collection has encouraged brand aligned innovation within industry and has promoted the philosophical shift away from selling products and activities toward developing and delivering unique and memorable experiences at a relatively limited cost – essentially the cost of time to administer and oversee the programme. These experiences now differentiate Canada in the marketplace, help create the 'movie' of Canada in the mind of the traveller and are the basis of more meaningful destination experiences.
- The programme has significantly strengthened Destination Canada's working relations with small and medium-sized tourism businesses across the country and has created a win-win situation for both parties. Destination Canada can use the collection to showcase the country through CSE integration initiatives developed and delivered globally, while industry can leverage the programme in a range of ways. These include

increased packaging or cross-promotional opportunities with other CSE members; strengthened business relationships with the travel trade, and invitations to participate in networking events; and, increased media exposure through hosting media FAM trips. For the members, this has provided prestige and marketplace credibility, and has resulted in increased sales and global recognition.

- From the travel trade perspective, the CSE collection is a valuable sales tool and is used extensively by receptive tour operators in building itineraries. Indeed, in many ways it is the activities of the travel trade and media that are now driving the programme. The challenge is to ensure that these activities associate the member badge with the qualified experience rather than with the company or business.

### 3.9 Key Lessons on what has not worked well for the projects

#### Touring Route: Wild Atlantic Way, Ireland

Fáilte Ireland is happy with how the project has been implemented to date – good progress has been made in a short period of time, and feedback from business and trade stakeholders has been very positive. Two areas were identified that where with hindsight applied, Fáilte Ireland would have perhaps taken a different approach:

- Discovery Points along the route was potentially an overly ambitious number, despite the 2500km length of the route. In retrospect, ensuring that all 188 have clear points of differentiation has been challenging.
- Communities have embraced the Wild Atlantic Way enthusiastically providing input prior to signage and interpretation was implemented. Given the positive response, community engagement could potentially have taken place at an earlier stage.

#### Touring Route: Queensland Drive Tourism Programme, Australia

##### ***Sustained Tourism Marketing***

- Early experience from Tourism Queensland's marketing of its drive tourism routes was that planning for sustained investment was crucial. Routes were launched to a fanfare of publicity, however, when this wasn't sustained, impact dropped away quickly. Without the State-level financial support, appeal was lost – the routes became standard parts of destination marketing rather than special experiences.

##### ***Engaging Businesses from the Outset***

- With hindsight, Tourism Queensland would have placed more emphasis on engaging businesses when routes were first developed – there should be a mutually beneficial relationship with business-led experiences adding to the value of the touring route and vice versa. However, for some routes, businesses primarily leveraged off the value of the touring routes.

### **Emphasis on Experience Development**

- To deliver the routes' potential, businesses needed to do more than simply displaying a logo - unique experiences needed to be developed which reflected the values and special nature of route.

#### **Touring Route, Great Ocean Road, Australia**

Although perhaps stating the obvious for a road-based touring route, maintaining and managing the physical infrastructure in line with use is critical. As population and visitor numbers have increased, this has not taken place in on a co-ordinated basis along the Great Ocean Road - some infrastructure is no longer fit for purpose in a premier destination. A \$50m investment programme is now in place and the region's Master Plan has set out a strategic plan of action, however with hindsight these plans should have been instigated some time ago.

#### **Cycling Route: The Vennbahn Cycle Route, Northern Europe**

##### **St Olav Ways**

##### **Regional co-ordination**

- This has not been easy because the geography covered is considerable and different areas have different interests and policies. Parts of the pilgrim routes are in fact in Sweden.

##### **Issues around carrying capacity**

- These are now emerging due to the rapid growth, and there is a shortage of accommodation and places to eat in some locations. The challenge is to stimulate further sustainable growth, while retaining the authenticity, high environmental standards and personal touch that is such a feature of the journeys. An accommodation audit is in progress, to plan future growth.

##### **Fulfilling the Needs of Tour Operators**

- There is increasing interest from tour operators, but the bed-stock they require is only available in the bigger towns. The Camino del Santiago has embraced mass tourism, but this is not part of the St. Olav strategy.

##### **Vennbahn**

##### **Transport Access**

- There is still much work to be done on improving public transport access. Despite the existing train stations at the start and end point, Vennbahn suffers from a lack of bus connections for the day visitors who are not riding the entire route.

## Destination Packaging: Switzerland Tourism and Partners

The ST/STC partnership has been successful however several challenges are apparent;

- STC is successful but competition is fierce and most business to Switzerland by-passes them through other companies such as Booking.com, Expedia, TUI, Thomas Cook and so on. STC is fully exposed to the market.
- Engaging a critical mass of players in a common effort is very challenging as Switzerland is organised in a much more federal way than the UK. It is also difficult to achieve collaboration between various railways partners who have their own commercial priorities
- Keeping a focus on visitors' experiences and perceptions and avoiding 'political' distractions is a constant challenge

## Experience Development Programme: Canadian Signature Experiences Collection

While the collection has grown, and has played a significant role in raising the bar and providing industry with a goal to strive toward, it has faced significant challenges:

- Establishing the collection as a membership-based initiative creates expectations from the members that may be outside the scope of the programme. The CSE collection was originally built with significant dedicated staff resources within Destination Canada. As these resources have been reduced with new and emerging priorities, the capacity to deliver a meaningful programme from the members' perspective becomes more challenging. The decision to co-manage with the provinces and territories has assisted in addressing this challenge, but it nevertheless has created a perception of dilution of effort and programme significance.
- The programme was initiated as a business-to-business initiative. As Destination Canada moves increasingly toward having more direct contact with the consumer as a media organisation, this will require the development of new directions for the CSE collection. Maintaining the relevancy of the experiences for the consumer will become critical, and the role of story in relation to content management will become much more important as Destination Canada seeks to create the story of Canada in the digital world. Businesses that are good storytellers are likely to become more prominent, and the emphasis on developing storytelling skills will need to be further developed within mentorship programmes.