

THE WILD ATLANTIC WAY FINAL REPORT - COMPARATIVE REVIEW AND RECOMMENDATIONS

Prepared by Gordon Hammond, Ryan Murphy, Dolores Wilmshurst and Harvey Sawler - January 1 2016

Committee Mandate

“ The Wild Atlantic Way Final Report Review Committee is an ad hoc committee of the STEP Working Group, reporting to the Working Group, tasked with reviewing in detail the report in question and applying the approach and methodology of the report to the Bay of Islands area and proposing to the Working Group a summary of its findings with recommendations for review by the Working Group as a whole. The committee will be comprised of members of the Working Groups interested in serving on the committee. The committee will be chaired by Gordon Hammond. The committee will endeavour to complete its work before December 31 2015. As part of its work the committee will liaise with Harvey Sawler to ensure that its work meshes with his.”

THE WEST (ATLANTIC) COAST OF IRELAND

Geographical Description

The Wild Atlantic Way runs 2,500km in length along the West coast of Ireland. The Wild Atlantic Way is the longest designated coastal route in the world. It begins in the Inishowen Peninsula in County Donegal and ends in Kinsale, County Cork.

Fundamental Attraction

The Wild Atlantic Way is fundamentally a coastal touring route targeted at experience-seeking drive travellers with interest in landscapes, culture & the outdoors.

Target Markets

The target market for the Wild Atlantic Way is the “experience-seeking-drive-travellers”. They are typically people who:

- Drive to capture a sense of freedom or independence
- Regard themselves as travellers rather than tourists
- Undertake a specific type of travelling at distinct stages of their lives
- Put a lot of thought and planning into the creation of their travels

“Experience seekers” can be characterized as people who:

- Are regular international travellers

THE EASTERN (ATLANTIC) SHORE OF NOVA SCOTIA

Geographical Description

The area stretches 100 km as the crow flies from Musquodoboit Harbour to Sherbrooke and is comprised of roughly four hundred wild and pristine islands easily accessed from the 135km of the #7 coastal highway **and its 100 kms of side roads**. The area can also be accessed directly from the Atlantic Ocean and has a number of inland wilderness areas accessible by river from the coast.

Fundamental Attraction

The area is fundamentally a coastal destination of increasing potential primarily targeted at travellers seeking to comfortably view and/or physically experience the numerous pristine wild islands and their surrounding waters, that together create a unique ecosystem, while also exploring the area’s existing and emerging authentic heritage, culture and cuisine experiences.

Target Markets

Tourism Nova Scotia (TNS) has recently adopted the “Explorer Quotient” market segmentation approach of Destination Canada and identified “Authentic Experiencers”, “Cultural Explorers”, and “Free Spirits” as its priority market b. Given the central role that TNS plays in the development, growth and funding of Nova Scotia’s tourism industry we recommend that the STEP Working Group seriously consider adopting the Tourism Nova Scotia market segmentation priorities in the development of its own Action Plan. This would mean a change from the previously adopted “Outdoor Enthusiast” segmentation but the STEP area does align very well with two

- Seek out and enjoy a range of personal experiences of a type they particularly enjoy and like to talk about
- Involve themselves in active and participatory holidays, are sociable in personality and like socializing with local people
- Are naturally active and like to do and learn new things
- Are adventurous and enjoy a variety of experiences on each single trip
- Place high importance on value for money and critically balance benefits with costs
- Place a high value on experience that contrast with their day-to-day lives

Although they were not able to authoritatively document the market the WAW consultants believe that all of the evidence world-wide is that the experience-seeking drive-tourism market is growing and will continue to do so but for growth to happen in a specific place/region a strong brand needs to be developed and managed and that there needs to be a sound understanding of the demand/supply and push/pull factors which will influence the development of the market.

Demand/supply factors are things like the availability of rental vehicles of all kinds; the extent frequency and cost of ferry, rail and air access services; the level of knowledge and awareness of the market; and the growth in the target population eg. Baby Boomer retirees.

Push/Pull factors are things like the quality of the landscape; quality and extent of support facilities such as toilets, cafes, parking and accommodation; availability of attractions, events, travel itineraries, range of accommodations, police and emergency services, and insurance coverage.

Brand Proposition

The Brand Proposition for the Wild Atlantic Way is based on the unique selling point of **“Wild”** and five value propositions:

- Seeing and exploring the **WILD** landscape and seascape
- Driving roads on the edge of the **WILD** seascapes
- Exploring settlements along the **WAY**

(“Authentic Explorers” and “Cultural Explorers”) of the three TNS priorities with respect to the area’s fundamental attraction-potential for future product development.

“Authentic Explorers” are:

- More learned, understated travellers who appreciate travel
- Prefer to do their own thing at a destination
- Have a keen interest in historical travel
- Actively seek the most authentic cultural experiences
- Have a lower interest in more active, adventurous experiences
- Love trips that teach them about history, take them away from the crowds of tourists and aren’t a whirlwind tour of “must-sees”

“Cultural Explorers” are:

- Avid travellers who value learning and discovery
- Don’t feel like a tourist, want to “blend in”
- Prefer a free and spontaneous approach to seeing the sights
- Love to share their experiences, it’s part of the fun of travel
- Love trips that take them “off the beaten track”, allow them to connect with the locals and fellow travellers, are fun but teach them something as well.

More detailed information about these two EQ market segmentations is provided at the end of this review.

Note that while the Wild Atlantic Way market segmentation and EQ market segmentation are not identical they are very similar and in particular it is important that the Demand/Supply and Push/Pull factors be considered for the Wild Islands

Brand Proposition

The Brand Proposition for the area is based on the unique selling point of **“Wild Islands”** as a minimum with the strong consideration(subject to consumer testing) of the addition of **“Archipelago”** as this adjective evokes the exotic and informs potential visitors that there are a lot of islands or it would not be called an archipelago. As well, the idea of an

<ul style="list-style-type: none"> • Exploring and experiencing the culture of the people • Experiencing and participating in events 	<p>archipelago is unowned market territory in Atlantic Canada if not in Canada. The area's value propositions are:</p> <ul style="list-style-type: none"> • Driving and coastal highway and its side roads to see the WILD ISLANDS archipelago • Exploring by water the WILD ISLANDS archipelago • Exploring settlements along the WAY • Exploring and experiencing the culture of the area's people • Experiencing and participating in events
<p>Unique Selling Proposition The core USP is the wild Atlantic coastline and the meeting of its landscapes and seascapes together with the history, heritage and culture of the places and people where the roads pass through and the land meets the sea.</p>	<p>Unique Selling Proposition The core USP's are the very idea of introducing the word 'Archipelago' into the Atlantic Canada tourism vernacular, and the unique-to-Nova Scotia pristine wild islands archipelago that is easily accessible from the coastal highway and its side roads, as well as directly from the Atlantic Ocean, an area where ocean, islands and land meet to create an enduring natural and cultural heritage.</p>
<p>Unique Value Propositions The are five specific value propositions embodied in the brand proposition:</p> <ul style="list-style-type: none"> • Driving, cycling and walking the roads/routes on the edge of the wild land and seascapes • Seeing and exploring the wild landscapes and seascapes • Exploring the settlements along the Wild Atlantic Way • Experiencing the culture of the people and places along the Wild Atlantic Way • Participating in events and activities along the Wild Atlantic Way <p>These value propositions focus on the roads where the land meets the sea and not on their hinterlands. This focus is what will attract experience-seeking drive travellers, the target market.</p>	<p>Unique Value Propositions The value propositions listed below are based on the profile of the Authentic and Cultural Explorers outlined above but with an inclusion of visitor who have a higher interest in more active and adventurous experiences.</p> <ul style="list-style-type: none"> • Driving, cycling and walking on coastal roads/trails from where the wild islands can be easily seen and learned about • Seeing and learning about the wild islands close-up and in comfort from the deck of a hired tour boat • Exploring the wild islands by a personally owned or rented kayak, or other watercraft • Exploring the coastal settlements in the area • Experiencing and participating in the culture and events of the people and places within the area
<p>Brand Development Strategy Brands and their value propositions need to be carefully and constantly managed if they are to be successful. For the development and management of the brand a Strategic Brand Development Partnership is needed, modeled on similar approaches that have been developed in Norway and using the</p>	<p>Brand Development Strategy The STEP Working Group needs to commence the development of a brand. We suggest that:</p> <ol style="list-style-type: none"> 1. A decision needs to be made about whether or not to adopt the new EQ market segmentation now used by TNS. 2. Based on this decision the area needs to have a name that will

America's Byways as a best practice example.

appeal to the target market. Assuming the target markets are Authentic and Cultural Explorers then we suggest the name should be "Nova Scotia's Wild Islands (something)" We feel the geographic delineator of Nova Scotia is better than "Canada's Wild Islands (something)" as it suggest an importance that could be lost if potential visitors were looking at Canada as a whole while giving the area more gravitas than "Halifax's Wild Islands (something)". The name must have "Wild Islands" in it and possibly a final adjective such as "Archipelago", "Coastline", "Coast" or "Way" etc. The final decision, if possible, should wait until after the GMIST meeting and, ideally, a testing of the name targeted at the target market and their methods of travel research and planning. The STEP initiative could importantly be the first such initiative in Atlantic Canada to insist on carrying out a comprehensive consumer test, thereby setting a new standard for sustainable tourism community planning within the region if not in Canada.

3. Secure the websites for whatever name is chosen (www.wildislandsarchipelago.ca has already been secured just in case this is chosen) and secure funding for two years to continually update it as services and products are developed. Note that we envisage an iterative approach to the physical development of the area, its products/services and marketing. This will allow for an incremental approach that can commence quickly and build over time minimizing unmet expectations by visitors and imprudent investment by the private sector.

Product Development Strategy

The proposed basic strategy is to form a partnership organization with representation from key stakeholders such as the Departments of Environment, Transport and Finance; the national tourism agency; the national and local road authorities; and core private sector players including car rental agencies, event organizers, heritage/cultural attraction owners and managers. The partnership organization would be an integrated destination development, improvement and management organization that isn a lean organization using existing resources

Product Development Strategy

Create a prioritized list of free-to-use public-sector-funded base-level enhancements and private sector product developments that will quickly provide an increase in the way visitors are able to experience the islands, subject to detailed, professional advice and design based on consumer experiential demands. Such enhancements might, for example, include:

1. Design and build a critical mass of "Wild Islands" look offs that become hallmark moments representative of the destination, featuring state-of-the art viewing and interpretive aids Note that each

with a **Lead, Champion and Broker**. The partnership would be responsible for:

- Allocating national funding to road development and the creation of new viewpoints and associated facilities
- The integrity of the brand
- Its marketing and promotion
- Market research to keep abreast of trends in the experience-seeker market segment
- The long-term development of the strategic value propositions (Driving, Seeing, Exploring, Experiencing, Participating)
- Monitor performance against established targets

warranted site needs to really connect people to the islands and should located be to maximize a “wild islands” view. The locations should be approximately equi-distant so as to provide view-points along the entire #7 highway and its main side roads. This development would be a baseline attraction for Cultural Explorers.

2. Establish a working committee with the Eastern Shore Fisherman’s Protective Association to investigate the opportunities and barriers to develop an area-wide capacity for visitors to explore the islands on authentic marine vessels with real economically diversified fishers. This strategy maximizes authenticity, accessibility, geographic service provision and passenger safety. Barriers will likely be regulatory, insurance and marketing/customer handling. This development would be a baseline attraction for Authentic Explorers.

Traveller Services Strategy
See Product Development Strategy immediately above

Traveller Services Strategy
Create a prioritized list of basic services the targeted visitors will need and then implement them as funds for initial and ongoing costs becomes available. Initially we suggest:

1. The creation of a dynamic, interactive web site which creates a home for the destination and its services, experiences, social media activity, a YouTube channel and Trip Advisor interactive response.
2. The creation of a new state of the art signage and way-finding strategy that works in accordance with Provincial standards, regulations and the existing scenic drive touring network.
3. Establish year-round, accessible, public washrooms, in each of the three primary access communities, clearly identified as a public washroom, that have potable water available, Critically, these washrooms must be spotlessly clean at all times and thus likely should be municipally operated. However, consideration should be given to locating these washrooms in association with existing year-round businesses such as gas stations, banks or motels, where at least a minimum of security/monitoring can be provided. Location of washrooms should be clearly signed and identified on-line.
4. Ensure there is cell phone and high-speed internet coverage a minimum of 5kms either side of the #7 highway and its coastal side roads.

Travel Values

The Cultural Explorer is an avid traveller who values learning and discovery while travelling. They don't want to feel like a "tourist," preferring just to blend in and have the most authentic experience possible rather than being confined to group tours and schedules.

A Cultural Explorer will seek:

Constant Travel: Always excited about the next trip.

Living History/Culture: Love to learn about and absorb themselves in the ancient history, as well as the modern cultures of the places they visit.

The Beauty of Nature: Will choose destinations that provide opportunities to experience natural beauty.

Fun, Shared Experiences: Travel is a journey, not the destination, and is best experienced with like-minded companions who like to have fun while learning.

Going with the Flow: Prefer a free and spontaneous approach to seeing the sights.

A Cultural Explorer will avoid:

Luxury/Comfort-seeking: This EQ type seeks an authentic experience and doesn't need to be pampered in commercial hotels and have experiences just like home.

Group/Checklist Travel: Prefer not to be constrained to "tourist" schedules or destinations, and will chart their own courses..

Experience Appeal

Like their Free Spirit counterparts, Cultural Explorers are more likely to find many activities appealing to do on a long-haul vacation.

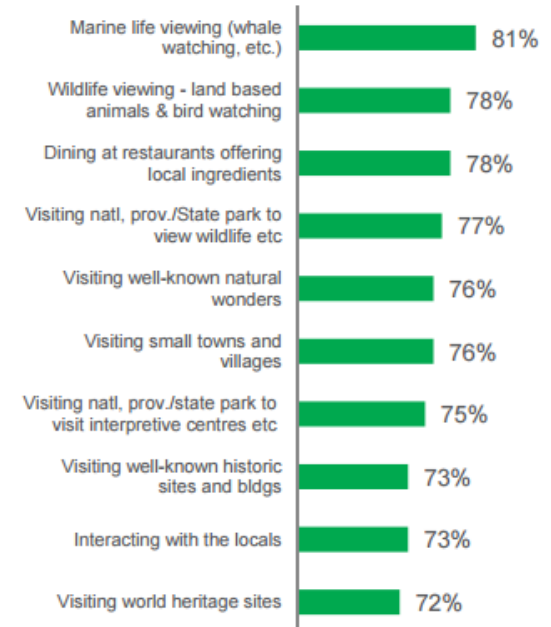
Cultural Explorers are more likely than other travellers to be interested in:

1. Nature Observation Activities
2. Exhibits, Architecture, Historic Sites/Buildings, Museums
3. Sightseeing Activities
4. Accommodation-related Activities
5. Water-based Outdoor Activities
6. Hands-on Learning Activities
7. Festivals, Events & Spectator Sports
8. Outdoor/Nature Sports & Activities
9. Winter Outdoor Activities

Cultural Explorers are also interested in:

1. Shopping, Dining and Other Food-related Activities
2. Entertainment, Performing Arts and Amusement Parks
3. Cruises & Touring

Top 10 Most Appealing Activities Among Cultural Explorers:



Authentic Experiencers

9% of the Global Market



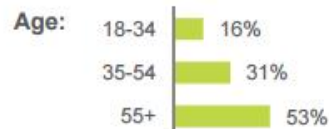
Demographics



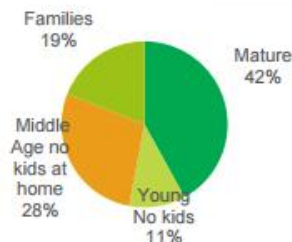
Education: Higher than average

Employment: FT – more likely than avg to be retired

Household Income: Average



Lifestage



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Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit.

Personality traits: Steadfast, understated, responsible, interested, rational

Social Values

Top defining Values

Personal Control: They focused on maintaining a sense of autonomy and self-direction in their lives. Many are retired, with time to do the things they want to do.

Importance of Spontaneity: They enjoy surprises and the unexpected – they will welcome those that help them learn more about themselves and the world.

Culture Sampling: They show a tendency to incorporate foreign cultures into their lives, like going to an Inuit art gallery or dining at a Thai restaurant.

Everyday Ethics: They feel it's important to be responsible, upstanding citizens.

Skepticism towards Advertising: Their tendency to question authority, extends to commercials trying to sell something. They believe that individuals are responsible for their own decisions.

Ecological Concern: They are concerned about the health of the planet and what that means to future generations.

Bottom defining Values

Joy of Consumption: Although they are relatively affluent and confident financially, they are not avid consumers.

Living Virtually: They want to connect with the real world authentically and are not content to do so by way of TV, computers or the internet.

Importance of Brand: They care little about brands – but they're not afraid to pay for quality if it matches their values.

Travel Values

The Authentic Experienter is a more learned, understated traveller. Travel is not their only interest in life, but they certainly appreciate it when they go. They prefer to do their own thing while at a destination, having control over what they see and when they see it.

An Authentic Experienter will seek:

Living History/Culture: Love to learn about and absorb themselves in the ancient history, as well as the modern cultures, of the places they visit.

To Understand Cultural Differences: While they are not high on the trend Comparison Travel, they love to observe the difference between destinations.

An Authentic Experienter will avoid:

Hedonistic Rejuvenation/Comfort-seeking: This EQ type does not shy away from living like the locals do. They like to be in control while they vacation, and don't need to be pampered and have everything taken care of for them.

Escape: These travelers do not feel overwhelmed by life. Travel is not about escape for them, but about personal development and learning instead.

Experience Appeal

Authentic Experiencers are more selective in the experiences they find appealing to do on a long-haul trip.

Authentic Experiencers are more likely than other travellers to be interested in:

1. Exhibits, Architecture, Historic Sites/Buildings, Museums

Authentic Experiencers are also interested in:

1. Nature Observation Activities
2. Sightseeing Activities
3. Shopping, Dining and Other Food-related Activities
4. Entertainment, Performing Arts and Amusement Parks
5. Accommodation-related Activities
6. Cruises & Touring
7. Water-based Outdoor Activities
8. Hands-on Learning Activities
9. Festivals, Events & Spectator Sports
10. Outdoor/Nature Sports & Activities
11. Winter Outdoor Activities

Top 10 Most Appealing Activities Among Authentic Experiencers:

