Marketing Strategy
2012 - 2017

Contents

Background .................................................................................................................................................. 3
  Context .................................................................................................................................................. 4
  Legislative Context ................................................................................................................................. 4
  North South Ministerial Council Decisions ......................................................................................... 4

Policy Context ......................................................................................................................................... 5
  Waterways Ireland Corporate Strategy ............................................................................................... 5
  Waterways Ireland Marketing and Promotion Strategy ........................................................................ 5
  Economic and Social Context ............................................................................................................... 6
  Development and Investment Context ............................................................................................... 8

Evaluation and Review .......................................................................................................................... 9
  Use of marketing tactics ....................................................................................................................... 9
  Allocation of resources ....................................................................................................................... 10
  Effectiveness of meeting the marketing objectives ......................................................................... 10

Marketing Strategy ............................................................................................................................... 15
  Marketing Mission ............................................................................................................................. 15
  Strategic Marketing Objectives ......................................................................................................... 15

Strategy Implementation ....................................................................................................................... 16
  Marketing Programmes ....................................................................................................................... 16
  Marketing Tactics ............................................................................................................................... 17
  Next Steps ......................................................................................................................................... 18
  Targets ............................................................................................................................................... 18
  Funding ............................................................................................................................................. 18
  Review and Monitoring ....................................................................................................................... 19
Background

Waterways Ireland as a relatively new and unique cross border organisation needs to have a strategy underpinning its action plans. The first 10 years of the organisation have been hugely successful and the purpose of this Marketing Strategy is to chart and outline the course set for Waterways Ireland from a marketing perspective over the next 5 years, building on the successful performance of the first Marketing Strategy. It takes into account the significant achievements of that strategy as well as the trends, developments and external factors affecting recreation and tourism on the island of Ireland in general and in particular use and usage of the inland waterway systems.

The waterways of Ireland are a superb recreational and tourism resource and Waterways Ireland through the implementation of its Marketing Strategy will continue to promote and develop the economic and social contribution of Ireland’s inland waterways.
1. Context

1.1 Legislative Context

Waterways Ireland is a North-South Implementation Body and was established by means of an international treaty made on 8 March 1999 between the British and Irish Governments. The treaty was given domestic effect by means of the North/South Co-operation (Implementation Bodies) (Northern Ireland) Order 1999 and the British – Irish Agreement Act, 1999.

Waterways Ireland is charged with the management, maintenance, development and restoration of certain inland navigable waterway systems throughout the island of Ireland, principally for recreational purposes. It is responsible for the following navigation systems:

- Barrow Navigation;
- Erne System;
- Grand Canal;
- Lower Bann Navigation;
- Royal Canal;
- Shannon Erne Waterway; and
- Shannon Navigation.

It is also responsible for the restoration of that part of the Ulster Canal between Lough Erne and Clones.

The legislation also requires that Waterways Ireland in exercising its functions engage in promotion, including marketing and development of the tourism and commercial potential of the inland waterways for which it has responsibility.

1.2 North South Ministerial Council Decisions

In June of 2001 and in accordance with the legislative remit of Waterways Ireland, the North-South Ministerial Council decided to re-enforce the remit of Waterways Ireland from a marketing perspective. The Council approved Waterways Ireland’s plan to:

- Establish an advisory group on marketing issues, with representatives from the relevant tourism, commercial and community interests;
- Work closely with Fáilte Ireland, the Northern Ireland Tourist Board and Tourism Ireland Ltd. in the widespread marketing and promotion of the waterways resource;
- Continue with promotional activities already underway; and
- Upgrade and increase resources to its Marketing and Promotions Division.

In 2007 Waterways Ireland, following a decision of the North-South Ministerial Council, was given responsibility for the restoration and subsequent management, maintenance and development of the Ulster Canal from Upper Lough Erne to Clones principally for recreational purposes.
2. Policy Context

2.1 Waterways Ireland Corporate Strategy

The Corporate Strategy for Waterways Ireland is set out in its Corporate Plan. This plan outlines the mission for the organisation as to strive to provide a high quality recreational environment centred on the inland waterways of Ireland in its care, for the use and benefit of everyone and having defined its values and standards, translates the mission into key strategic objectives as follows:

• Manage and maintain a reliable and high quality waterways network;
• Develop and restore the waterways network;
• Enhance the existing waterways network to widen its appeal to users;
• Promote increased use of our waterways resource principally for recreational purposes;
• Assess, manage and develop the assets of Waterways Ireland; and
• Develop an organisation of excellence.

These objectives drive and direct its business strategies and priorities, supporting the organisation in delivering all of its functions.

The Marketing Strategy, as one of these business strategies, proactively engages with all of the Corporate Plan’s Strategic Objectives enhancing performance and business delivery.

The Corporate Plan 2011 - 2013 seeks to build on its achievements to date and develop a strategy for the changing and challenging times ahead.

2.2 Waterways Ireland Marketing and Promotion Strategy

Following the North South Ministerial Council decision in June 2001 Waterways Ireland developed its first Marketing and Promotion Strategy and in the intervening years has implemented its recommendations.

Based on its mission statement its marketing role was defined as to increase awareness and promote greater use of Ireland’s navigable inland waterways.

However, the extent to which Waterways Ireland’s marketing role was primarily awareness creation or product promotion depended on a number of product, institutional, market, promotional and funding issues. These included low awareness of waterways amenities, product deficiencies, static utilisation of the waterways, and large number of bodies/agencies with overlapping promotional roles with no organised or integrated approach to promotion, amongst others.

In response to these issues, a proactive strategy was adopted by Waterways Ireland with the objectives of:

• Awareness creation;
• Development of Waterways Ireland’s corporate identity;
• Promoting greater use of the waterways;
• Working in partnership with other bodies; and
• Building a platform for sustained market development.
This strategy combined both destination and product marketing aspects to provide a complete picture to the user, building awareness of the waterways themselves while also providing practical product information to facilitate activity. To satisfy the marketing needs of different target groups an integrated strategic approach which included public consultation was implemented. Expanded over successive years, this approach has met the above objectives.

2.3 Economic and Social Context

The economic and social context, under which a new Marketing Strategy for Waterways Ireland is being prepared, can be summarised as follows:

2.3.1 Economic Climate

The economic context in which Waterways Ireland now operates has changed fundamentally in the last year. The global economy as well as the economies of both Northern Ireland and Ireland have experienced difficulties and recession.

2.3.2 Recreation and Tourism Trends

Waterways Ireland has undertaken research, on its own behalf and in conjunction with Fáilte Ireland, which has provided data and information in relation to the trends and changing patterns from a recreational and tourism context. Indicators have shown increased numbers of people participating in recreation along the navigations from a range of socio-economic and age groups. Exercise has become an essential component of people’s lives and has impacted on the type and level of activity undertaken. The promotion of the health agenda and the range of clubs formed have facilitated more people to access recreational activities.

Further information is available on the following websites:

- www.waterwaysireland.org
- www.failteireland.ie
- www.nitb.com
2.3.3 Demand
The type of demand has changed at an increasing pace in recent years. Tourism in general to both Ireland and Northern Ireland has seen considerable growth in the short break market but has experienced a decline in the longer holiday market. At the same time tourists are seeking activity-led stays while the sightseers and culture seekers category is still the strongest sector from a tourism perspective. Tourism Ireland has undertaken extensive research in this area and the market intelligence surveys, response to Ireland surveys are a key research tool. For further information visit www.tourismireland.com

From a recreational perspective the demand for leisure activities has never been greater. Walking, cycling and watersports have experienced significant growth and this is anticipated to continue as the product offering continues to be upgraded.

2.3.4 Access
Access to both Northern Ireland and Ireland has improved as budget airlines in particular deliver more flights to more regions. The growth in regional airports has also improved access to the waterways. Coupled with that, road access from the major urban centres has improved dramatically with a network of motorways providing easy access to the waterways. Increased start date flexibility by product providers has been required to meet the changing access patterns. The duration of waterways holidays has changed as people combine the waterways experience with off-water activities. There has been a significant increase in customers assessing the environmental nature of their holiday decisions and in people buying the totally green holiday. For further information visit

- www.failteireland.ie
- www.nitb.com

2.3.5 Technology
Mobile technology now has a major role in the lives of the population with the increase in use of GPS, mobile internet access and reliance on the internet as an informational resource. The immediacy of access to general information will impact on expectations of the provision of and type of waterways information and on customer service. In addition on-line and off-line campaigns are becoming less differentiated and the use of multi media and 3rd and 4th generation technology will be more integrated with that of mainstream promotion.

2.3.6 Health & Social Context
In recent years the benefits to one’s health has become an important factor in the decision-making process about recreational and pleasure activities. Whether seeking a holistic or stress-free experience, pampering, wellness, rehabilitation or fitness, health is a new key attribute of many holiday experiences. Health conscious consumers cross all demographics and cultures. The use of natural ‘green’ products or eco-tourism experiences in achieving a healthier outcome from leisure and recreational activity has also received increased attention from consumers. Visit www.failteireland.ie for further research details.
2.4 Development and Investment Context

The Tourism and Recreation Sectors are one of the largest and important indigenous industries in Northern Ireland and Ireland. These sectors provide and generate significant levels of employment and earnings and have brought economic activity to areas on the island where little or no other economic activity exists. The tourism and recreational development and investment along the waterways brings activity to the very heart of the island and the communities along the waterway corridors.

The Infrastructure Investment Priorities 2010-2016 for Ireland and the various Capital Spending Programmes of Northern Ireland continue to focus on developing recreational and tourism infrastructure. Numerous other strategies including those of Fáilte Ireland, the Northern Ireland Tourist Board and the Heritage Council continue to focus on the potential of the waterways as a recreational and tourism resource. Specific policies and programmes have been developed since the last Waterways Ireland Marketing and Promotion Strategy by Government Departments both in Northern Ireland and Ireland which provide opportunities for further development of the waterway and waterside product. The Departments with responsibility for Transport, Environment, Tourism, Culture, Leisure and Community are cases in point.
3. Evaluation and Review

In undertaking a review of the first Marketing and Promotion Strategy the following areas were examined by the Marketing Advisory Group:

3.1 Use of Marketing Tactics

The following tactics were utilised since 2004 in an effort to achieve the strategic objectives of the Marketing and Promotions Strategy:

- Advertising Campaign
- Event and Exhibition Management
- Sponsorship Programme
- Website Development
- Merchandising
- Visitor Services Management
- Archive and Library Content
- Education Programme
- Direct Marketing Campaigns
- Publication Materials
- Public Relations Programme
- Signage Programme
- Market Research Programme
- Corporate Identity Development
- Openings and Launches
- Joint Activity Programme
- Lakelands and Inland Waterways Initiative

The delivery of many of the tactics was achieved in co-operation with other Divisions of Waterways Ireland and indeed with other tourism, state and semi-state organisations as well as with local authorities and the trade.
3.2 Allocation of Resources
The full allocation of human resources to the Division was achieved over the course of the Strategy. The annual marketing spend by Waterways Ireland is approximately €1 million per annum with additional funding of approximately €2 million being leveraged from other organisations to support the inland waterways sector.

3.3 Effectiveness of Meeting the Marketing Objectives
The effectiveness of the tactics used can be quantified using a number of different measurements for example the number of hits to the website, research into recognition of Waterways Ireland, satisfaction levels with service, demand for services, attendance records at shows etc. A number of such measurements are quantified below:

- **Research** - 75% of those surveyed were aware of Waterways Ireland with 90% of hire cruiser users rating the waterways as good or very good. 61% of overseas respondents indicated they would return.
- **Website Hits** – the website hits increased from an average of 700,000 per month in 2007 to 1,500,000 per month in 2010
- **Sponsored Events** – approx 50 events across the waterways are supported annually bringing over 100,000 people to the waterways.
- **Joint Activities** – each year six major activities were supported and arranged in conjunction with local authorities, ranging from sporting, angling, community festival, heritage and water-sport events bringing international recognition to the waterways.
- **Waterway Discover Days** – ten locations across the island were showcased during 2009 and 2010 (five in each year).
- **Publications Produced** – new editions of five key promotional publications were published, along with two corporate publications. A number of other publications were supported by Waterways Ireland
- **Publications Distributed** – approx 50,000 copies of various Waterways Ireland publications distributed to boat owners, hire boat companies, boat sellers, hotels and Tourist Information Centres per annum.
- **Attendance at Shows** – approx 10,000 visitor enquiries per year dealt with at consumer exhibitions and shows.
- **Merchandise** – approx 20,000 individual items per year of Waterways Ireland branded merchandise distributed at consumer exhibitions.
Overall the marketing tactics employed to meet the marketing objectives of the Strategy were successful. Some of the significant achievements over the period of the Strategy are summarised as follows:

- Establishment of corporate identity and waterway identity;
- Development of award winning website;
- Establishment of press office and PR functions;
- Delivery of sponsorship programme;
- Delivery of a range of marketing material including DVDs, publications etc;
- Establishment and development of distribution network;
- Delivery of market research;
- Development of marketing partnerships;
- Initiation and delivery of Waterway Discover Days;
- Attraction, facilitation and support of world class events;
- Refurbishment and reopening of visitor centre;
- Establishment and delivery of library and archive; and
- A dramatic increase in number of boats using the waterways.

Waterways Ireland has over the life of the Strategy succeeded in raising the profile of the waterways and waterway products both at home and abroad. It has

- placed the waterways at the centre of the tourism product offering;
- increased the range and number of product offerings;
- assisted in delivering dramatic increases in participation levels; and
- contributed to and jointly commissioned various product strategies.

**Sponsorship**

Waterways Ireland has run a formal sponsorship programme for over five years supporting approximately 50 events per year alongside or on the waterways. Open to all applicants, the programme has supported events on or adjacent to the waterways such as the Irish Wheelchair Association Annual Fishing Competition, the ‘Row for It’ junior rowing competitions, wildwater canoeing competitions, North/South co-operative exchanges and much more. Waterways Ireland has also promoted the events through a press campaign and through the issue of 25,000 free copies of the ‘What’s On’ guide.
Lakelands & Inland Waterways

Arising from increased co-operation in the promotion of the cruising product, Waterways Ireland and Fáilte Ireland have developed in conjunction with other partners such as Northern Ireland Tourist Board, Fermanagh Lakeland Tourism, Shannon Development and Tourism Ireland, an initiative ‘Lakelands & Inland Waterways’ which encompasses the area from Belleek to Limerick and a 30km corridor either side of the navigation. Launched in autumn 2008 the initiative has branded the waterways, produced publications, DVD, website and has undertaken a domestic and international marketing campaign in 2009 and 2010. In 2009 Fáilte Ireland and Tourism Ireland adopted Lakelands & Inland Waterways as a super-region, guaranteeing the waterways an international profile and promotion in all their activities. Domestically the campaign has involved the launch and development of Discover Days with resulting increased awareness, buy-in from local ambassadors and increased waterway experience among residents and recreational users. Since 2008 €1.6 million was expended on the initiative both domestically and internationally with Waterways Ireland providing 50% of the funding for the domestic campaign.
Publications

Waterways Ireland has developed a diverse range of publications for the purposes of providing information to its external stakeholders including boat owners, recreational users of the waterways and tourists. Where appropriate, Waterways Ireland has collaborated with key partners to promote specific aspects of the waterways, such as heritage, hospitality, tourism and the environment. The dissemination of printed material is undertaken through direct customer mailings, distribution at consumer exhibitions, as well as bulk deliveries to tourist and waterway related outlets. In order to improve efficiency of service to customers, an online shop www.shopwaterwaysireland.org has been developed.

Events

Support for waterway-based events is a key marketing function, with an annual Sponsorship Programme providing financial as well as practical assistance to external groups. The programme seeks to attract new waterway users and fosters the ethos that events should be open and accessible to all. Larger events are facilitated through the Joint Activities programme, in collaboration with local authorities and other tourism, sporting or activity-facing organisations. Through sharing of expertise and resources, these joint activities seek to raise awareness with a wide audience and to encourage participation in a diverse range of activities, such as sports, water sports, angling and yachting.
Website

Through its website and intranet, Waterways Ireland has fulfilled the various informational needs of its stakeholder groups, including Navigational, Operational, Tourism, Educational, Corporate, Internal, Industry/Commerce and Governmental needs. Waterways Ireland website www.waterwaysireland.org provides the latest information about the waterways and has increased the number of hits from 700,000 in 2007 to 1,500,000 hits per month in 2010. The website provides a myriad of information in different forms, complying with W3C-AA information accessibility standards. Themes of content include the Education Suite, Image Gallery, Mapping, Press Releases, Recruitment, Tenders and Marine Notices. The website has been running in its present format for 5 years and will be reviewed during 2011.

Product Development Studies

During the life of the Strategy Waterways Ireland began the process of formulating product development studies for the waterways in its care. The Studies have been developed independently with a steering group comprising key partners such as Fáilte Ireland, Shannon Development, Local Authorities and Leader Groups guiding the preparation of each. The Studies’ aim is to identify the tourism, recreational and commercial potential of the waterways while at the same time the Studies’ aim to not only guide the Corporate and Business Planning Processes of Waterways Ireland but also influence capital investment by local authorities, state agencies and the private sector in the waterway and water side products. Studies undertaken to date include the North Shannon, Shannon Erne and Ulster Canal, the Erne, the Mid Shannon and Lough Ree, the Lough Derg, the Barrow and the Dublin City Canals. It is the intention to cover all of the navigations within Waterways Ireland’s remit in due course.

General

Based on the success of the previous Strategy and following the review and evaluation carried out by the Marketing Advisory Group, the Group recommended to Waterways Ireland that the organisation continues with the general thrust of the previous Strategy and to adapt it to accommodate the changing environment as outlined in Chapter 2. It recommended that a 5 year Marketing Strategy be formulated and adopted by Waterways Ireland.
4. Marketing Strategy

4.1 Marketing Mission
Essentially the marketing mission of Waterways Ireland is unchanged and is defined as increase awareness and promote greater use of Ireland’s Inland Waterways.

4.2 Strategic Marketing Objectives
Within the period 2012 – 2017, Waterways Ireland wishes to build on the success and achievements of the previous Strategy taking a more proactive approach in achieving the following strategic marketing objectives:

- promoting increased use of the Waterways including promoting the range of uses;
- creating awareness of the waterways including the commercial potential of the waterways; and
- creating working relationships with other state and semi state, tourism, trade, recreational organisations and users
5. Strategy Implementation

5.1 Marketing Programmes
To achieve those objectives in the period 2012 – 2017, Waterways Ireland will continue to develop and implement 6 key marketing programmes as follows:

• Waterway branding programme;
• Communication programme;
• Product development programme;
• Visitor services programme;
• Promotional programme; and
• Research programme.

5.1.1 Waterway Branding Programme
The Waterway branding programme seeks to build upon awareness of the waterways and of Waterways Ireland as an organisation, by utilising a clear, strong, identifiable brand image across the range of promotional and informational material, reinforcing the waterways brand to as wide an audience as possible. The high quality image portrayed will reflect the excellence of the experience upon the waterways, thus encouraging use.

5.1.2 Communication Programme
The Communication programme has been developed to enhance public relations and to ensure that Waterways Ireland’s customers, both internal and external, are provided with relevant, accurate, useful information about the range of available facilities, activities and eateries on and around the waterways, and that the message is communicated through various effective and efficient media.

5.1.3 Product Development Programme
The Product development programme is aimed at informing future development of the waterways, their facilities and their hinterlands, and at leveraging additional external resources where appropriate. A present baseline must firstly be established, before moving to identify and realise the latent potential of the waterways, in the context of the prevailing social and economic circumstances. Waterways Ireland has formulated a series of product development studies in co-operation with the relevant Local Authorities and tourism authorities.

5.1.4 Visitor Services Programme
The Visitor services programme is intended to reach out to potential waterways customers, informing them of the historical, recreational and environmental aspects of the various waterway systems under Waterways Ireland’s remit. The programme seeks to ensure that appropriately located and accessible facilities are available.

5.1.5 Promotional Programme
The Promotional programme seeks to encourage activity on and around the waterways through the provision of sponsorship, technical support and infrastructure to enable the delivery of a range of events celebrating the diversity of the waterways, including themes such as watersports, community festivals, angling, arts and heritage. The programme will also seek to maximise efficiencies by collaborating with a range of stakeholders to leverage additional support, and aims to attract new users in a
way that ensures equality of opportunity for all. The Promotional programme also provides for advertisement campaigns focused on promoting increased use and creating awareness of the waterways.

5.1.6 Research Programme

The Research programme serves to inform the delivery of other programmes through examining trends in relation to waterway usage, looking at attitudes and behaviour, and utilising this information to make decisions about Product development or to focus tactics for the Branding, Communications and Promotional programmes.

5.2 Marketing Tactics

The Marketing Tactics which Waterways Ireland will engage in (non-exclusively) to deliver the programmes are as follows:

Waterway Branding Programme
- continue to roll out of integrated signage programme;
- continue to implement signage package across organisation;
- develop and implement house style;
- continue to develop and distribute merchandise; and
- develop brand values and accessibility.

Communication Programme
- press familiarisation, liaison and public relations;
- photo library development;
- archive and library management;
- design, print and distribution of relevant publications;
- attendance at trade and consumer shows;
- website enhancement and population;
- formulate and deliver education programme; and
- formalise public consultation.

Product Development
- complete studies for all waterways;
- formulate and engage in consultative workshops;
- implement study recommendations where funding allows;
- create linkages with internal and external stakeholders; and
- research.
Visitor Services Programme

- establish separate marketing fund for the Visitor Centre;
- promote centre use as a multi functional space;
- increase revenue from the centre; and
- link archive, library and exhibition space at HQ to Visitor Centre in Communication Programme.

Promotional Programme

- review and manage sponsorship programme;
- implement and manage joint activities;
- deliver and manage partnerships with tourism, trade and recreation agencies; and
- formulate and manage advertising campaigns.

Research Programme

- quantitative research into boat usage and other recreational activities;
- assess statistics on boat numbers and boat movements; and
- qualitative research on attitudes and behaviour.

5.3 Next Steps

Having developed the Strategy and associated Marketing Objectives and Programmes, the key now is to ensure implementation. Waterways Ireland will take a lead role in ensuring this happens. At the same time, delivery will require the close support of other agencies and bodies, voluntary organisations and local communities.

Investment in the marketing programmes is a key component in achieving the implementation of the strategy and the challenge lies in the co-ordination of the various parties to deliver on the programmes identified.

The Marketing Advisory Group will continue to have a key role in advising on the programmes and their delivery.

5.4 Targets

A number of specific targets under which the achievement of delivery of the Strategy, its objectives and programmes are set out as follows:

- publication of 3 promotional publications per annum;
- distribution of publications to increased customer base;
- continued sponsorship of events including 3 large scale and a large number of small scale events;
- undertake press familiarisation on each waterway;
- attend 3 trade shows per annum;
- maintain the existing high number of visits at present to website;
- deliver education programme to primary school sector;
- increase visitor centre as multi-function space;
- strengthen links with tourism bodies; and
- establish greater co-operation with local authorities.
5.5 Funding
The funding for the Strategy and Programmes will be considered as part of the corporate planning process and as part of the annual business planning process in Waterways Ireland. Funding of the Strategy and Programmes will be dependent on the allocations and funding received from both Departments and on the ongoing priorities of Waterways Ireland.

5.6 Review and Monitoring
The Monitoring and Review of the Strategy its objectives and programmes will be delivered in a number of ways. The Waterways Ireland business planning procedure is a central element of this process. At the same time the Marketing Advisory Group will review progress on an annual basis and report to the Chief Executive. A mid term review will also be undertaken by the Group during the lifetime of the Strategy with that review being presented to the Chief Executive for consideration.