



Causeway Coast & Glens Tourism and Destination Management Strategy 2015 - 2020

Executive Summary



THE WAY FORWARD FOR TOURISM

Introduction and Background

As expectations and demand for high quality visitor experiences increase, along with greater competition from existing and new destinations (both regionally and globally), the need for a co-ordinated and robust approach to visitor destination management is vital.

The Causeway Coast and Glens area is currently a substantive part of one of the nine Northern Ireland tourism destinations and Causeway Coast and Glens Council has made the strategic decision to embark on a collaborative approach to the development of its visitor economy. The Council area appeals to a wide range of visitors from both Northern Ireland and further afield. With a diverse product offering, co-ordination and delivery of the visitor economy presents both opportunities and challenges.

This Tourism and Destination Management Strategy examines the way forward for tourism in the new Causeway Coast and Glens Borough Council area. It identifies the importance of tourism, how it should be structured, the role of the Council and its relationship, engagement and communication with tourism operators in the area.

THE NEED FOR A
CO-ORDINATED AND
ROBUST APPROACH TO
VISITOR DESTINATION
MANAGEMENT IS VITAL.



Strategic Context

Causeway Coast and Glens Borough Council fits within a two tier framework in Northern Ireland for tourism delivery and destination management. This local delivery remit aligns itself with Tourism NI, Tourism Ireland and Invest NI (INI) on overall policy direction, key market determination and investment priorities.



Tourism Performance

Tourism is worth £110m per annum by overnight expenditure (excludes day visits) to the Council area and accounts for 4,751 related jobs, or over 12% of local employment illustrating the importance of tourism as a key economic activity and a major prosperity driver for the area.

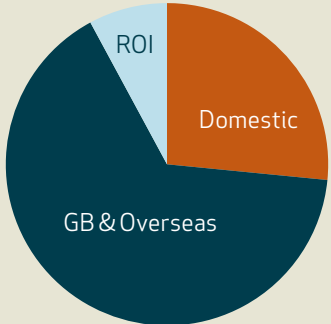
Key challenges include a high dependence on the domestic market and the fact that half the visits and value from tourism are experienced in the four summer months, highlighting the issue of seasonality.

12%
OF LOCAL EMPLOYMENT
= **4,751**
JOBS WITHIN TOURISM

Tourism in a National Context



4.1m visitors in 2013
Up 2% on 2012



total revenue of £723m,
of which
£474m from GB & overseas
£192m from domestic
£57m from ROI

5.2%

of NI's GDP



supports 1 in every 18 jobs
representing 43,000 jobs

Causeway Coast & Glens LGD Fact Card



TRIPS, NIGHTS & SPEND	2011	2012	2013	2013 v 2012	2013 % of NI
Trips	797,904	774,608	704,716	-9%	17%
Nights	2,681,215	2,553,712	2,347,447	-8%	16%
Spend	£106.5m	£123.7m	£110.1m	-11%	15%
Average length of stay	3.4	3.3	3.3		
Average spend per trip	£133	£160	£156		
Average spend per night	£40	£48	£47		



4,751 tourism jobs in Causeway Coast & Glens (CC&G) LGD – 12% of total employee jobs (the same proportion as North Down & Ards LGD and higher than any of the other LGDs)

The Giant's Causeway was NI's most popular visitor attraction in 2013

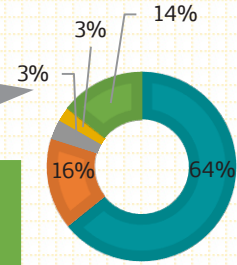


1.6m visits to visitor attractions in Causeway Coast & Glens LGD in 2013

ORIGIN OF VISITORS 2011-2013 (3 year rolling average)

Almost two thirds of overnight trips can be attributed to the domestic market, the third highest of all the LGDs

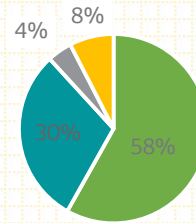
CC&G attracted the second highest proportion of ROI and other overnight trips but the third lowest proportion of European/North American trips of all of the LGDs



■ NI ■ GB ■ Mainland Europe ■ North America ■ ROI & Other


REASON FOR VISIT 2011-2013 (3 year rolling average)

The CC&G has the highest proportion of overnight holiday trips of all of the LGDs (followed by Newry Mourne & Down and Fermanagh & Omagh LGDs)



■ Holiday/pleasure/leisure ■ Visit friends/relatives
■ Business ■ Other

ACCOMMODATION STATISTICS 2013

	STOCK			OCCUPANCY	
	Number	Rooms	Beds	Room	Bed-space
 Hotels	19	708	1,911	60%	41%
GH/GA/B&B*	193	825	1,935	32%	24%
Self-catering	Units	Rooms	Beds	Annual	Peak (April-Sep)
	1,000	3,061	5,746	27%	42%

*Guesthouse/guest accommodation /bed & breakfast

47% of the available 12,311 self-catering bed-spaces in NI are in the CC&G LGD (the largest proportion of any LGD by far). CC&G LGD also has the largest number of GH/GA/B&B beds and the second largest number of hotel beds of all the LGDs

Hotel bed-space occupancy in the CC&G LGD is the same as occupancy in Newry, Mourne & Down and Lisburn & Castlereagh LGDs

Why do we need a Destination Management approach for the Causeway Coast & Glens Area?

Tourism is the interaction between visitors, the industry that serves them, the community that hosts them and their collective impact on and response to the environment, where it all takes place.

By working with key industry stakeholders and the community, and through a range of collective partnerships this strategy will allow for a management approach that works best for our area to deliver

- Benefit to the economy
- Support for our local community
- Protection and enhancement of the built and natural environment



Issues and Opportunities

- Provision of a quality product, with international stand out and a competitive edge
- Need to create and position the 'experience' so that we can maximise tourism yields
- Addressing the seasonality factor – overdependence on June-September
- Dispersal – can't neglect the 'honey pots' but need to plan for spreading the benefit across the area
- Develop a destination management approach – Council's role in driving, influencing, co-ordinating and managing all aspects of our destination
- Protect and develop our natural and built environment. Improve access and activity opportunities to areas of public space and the area's natural environment
- Need for a cohesive approach to maximising economic return through working in partnership
- Through best practice and in partnership with key stakeholders, including Tourism NI and Tourism Ireland, the area needs to communicate effectively with all market segments – both within Northern Ireland and beyond. The Council will work with its neighbouring Council areas to promote tourism where deemed mutually beneficial, eg The Causeway Coastal Route.
- Product development needs to keep pace with visitor expectations. The assessment of market fit and introduction of new products is needed to sustain existing and attract new markets and deliver on the marketing promise. This includes the quality of the visitor experience, customer care, presentation of our public realm in our towns, villages and countryside, the provision of events and encouraging and assisting innovation. These are vital to increase quality and enable differentiation in provision, to create and sustain a competitive edge over other destinations.
- A co-ordinated approach to destination management is needed to forge links with economic, urban and rural development providers, coast & countryside management, event organisers, working in partnership with statutory & voluntary agencies and facilitating support for the area's tourism operators.



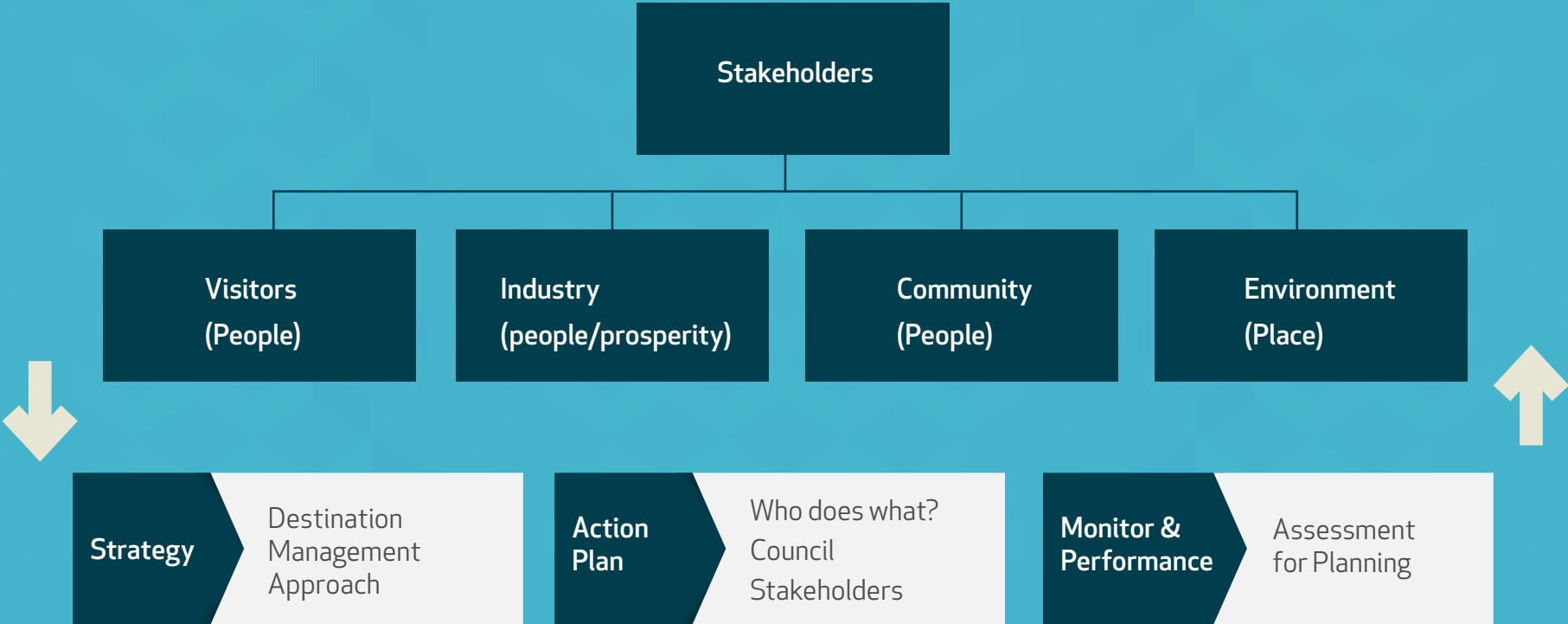
The Vision

Through best practice in destination management, Causeway Coast & Glens Borough Council will support and work in partnership with its tourism industry to develop and sustain the region as a high quality and competitive visitor destination.

This management strategy will work to enhance and protect the destination's resources for the present and future needs of both visitors and the community that hosts them.

Causeway Coast and Glens Council

Local Destination Management - its link with People, Place and Prosperity



Destination Management Organisation
Research, Planning, Development, Visitor Services, Marketing, Business Support, Regeneration.

Key Objectives

- Generate more visitors, motivate them to spend longer in the area and visit throughout the year.
- To communicate and engage with tourism operators and gain their commitment to delivering the shared vision and goals for the destination
- To support tourism operators throughout the Council area to start up new businesses and to grow and to be more competitive and innovative
- To develop initiatives that will encourage growth in specific sectors and enhance the area's tourism provision
- To establish a Destination Management Organisation within the Council area.



Key Product Gaps & Market Failures Identified

There are a number of Key Product Gaps and market failures across the area. The structured approach and development of service plans for product development, marketing, trade support and visitor servicing will identify future gaps in provision and recommend interventions for development.

Product Gaps

4&5 star hotel accommodation

Signature attractions and facilities across the area to convert day to staying visitors and increase dwell time

Night-time economy

Wet weather facilities

Local produce - food and craft

Market Failures

Lack of a ground handler infrastructure and operators – need better bundling and packaging

Public transport to and within the area

Broadband Infrastructure

Seasonal factors resulting in visitor peaks and troughs in demand impacting business growth and product investment

Travel trade orientation towards day visitor market (Giant's Causeway)

Runkerry Resort not likely to go ahead now

Weak accommodation balance, despite strong self catering and caravan provision



Key Destination Management Functions

- **Common Vision and Understanding**

A shared vision between stakeholders and a common approach to delivery

- **Planning and Development**

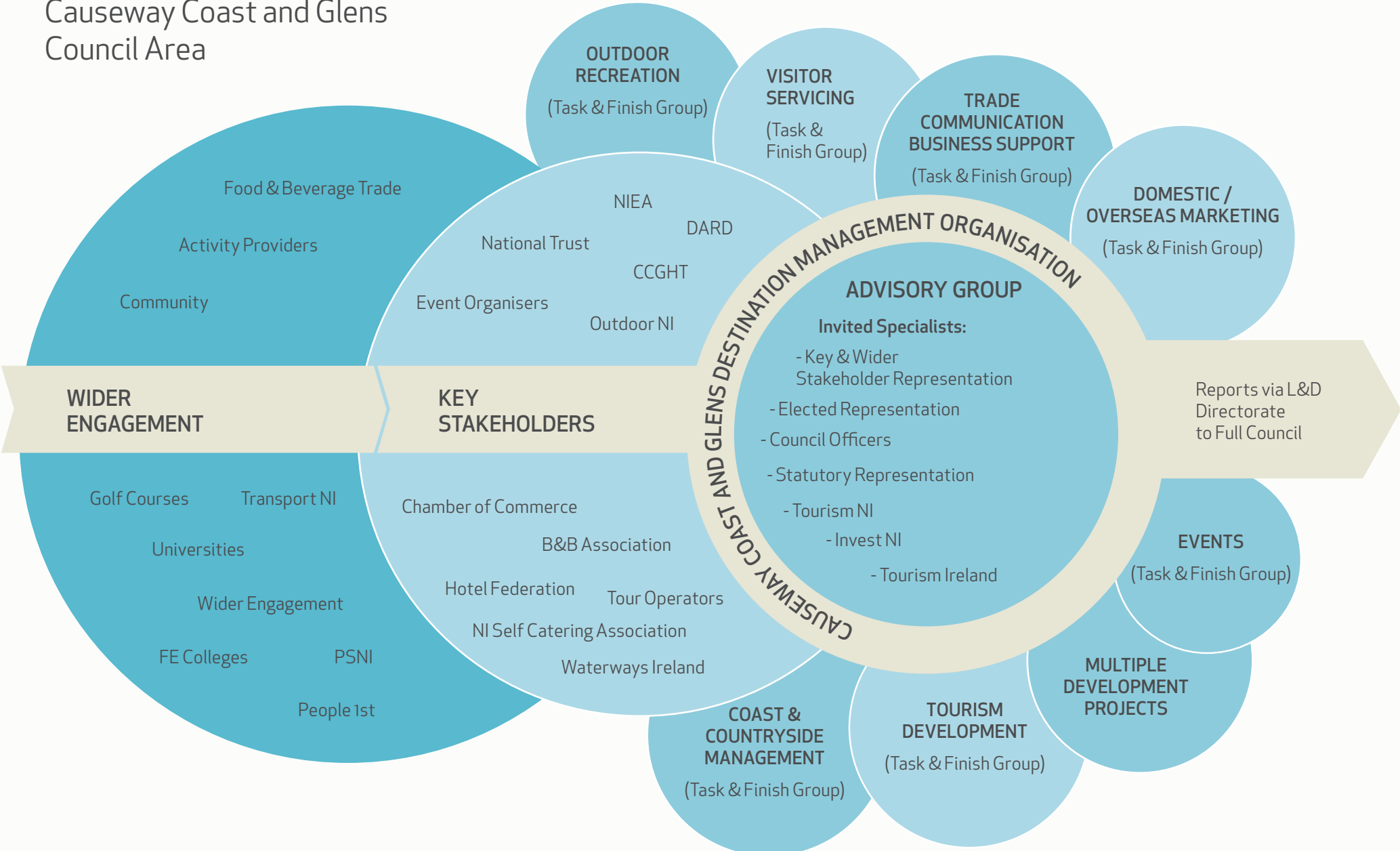
Planning for tourism investment, promotion of infrastructure development

- **Marketing and Information Services**

Sharing of advice, signposting, collaboration on marketing opportunities



Draft Model for Destination Management Organisation for Causeway Coast and Glens Council Area



Strategic Themes/ Service Areas

Marketing

The area must be marketed and promoted and all previous efforts to create visibility/awareness have to be sustained. The Causeway Coastal Route branding should be retained, and its value assessed for effectiveness, with recommendations for brand development presented.

A strong reliance on domestic visitors reflects the area's success within Northern Ireland. Great potential from markets outside of Northern Ireland exists and growth from this sector is essential to secure visitors who spend more, are likely to stay longer and make the biggest contribution to the local economy.

Key market segments include:

- Time Together (NI & ROI)
- Mature Cosmopolitans (NI & ROI)
- Family Fun (NI & ROI)
- Young and Lively (ROI)
- Social Energisers (GB, Germany, France, North America)
- Culturally Curious (GB, Germany, France, North America)
- Great Escapers (GB, Germany, France, North America)

Best routes to market will be developed within the Council's Tourism Marketing Service Plan.



Communicate and engage with our trade and facilitate business development – The Destination Management Approach

A pre-condition of success is engagement and co-operation with the area's tourism operators and key stakeholders. To this end a framework for communication and co-operation that jointly represents the tourism and visitor economy will be developed. The key aim is to motivate operators to engage with and to deliver on the tourism strategy; to gain their commitment to the vision, to encourage adoption of high standards and innovation, and to enable better participation in collaborative marketing and product development opportunities.

Key outputs include:

- Creation of specific Tourism Development Programmes
- Opportunities for Growth & Infrastructure development
- Networking and communication of information
- Development of Marketing Collaboration Opportunities
- Trade Seminars
- Signposting to specialist services

Detailed actions and outputs for industry support and communication will be developed within a trade support/engagement service plan.



Product Development

Energy and investment needs to be directed to a number of physical and 'soft' (service) product developments. These improvements will boost the area's reputation, increase quality and competitive advantage and encourage more visitors.

Key priorities for development:

- Broadening the accommodation base
- Clustering of attractions and 'bundling' of visitor experiences
- Coast & Countryside Development
- Activity Tourism
- Event Tourism
- Food Development
- Improving Visitor Access to Facilities (better opening hours)

Product development delivery spans across many areas of specialism(s) within Council and externally with trade and other stakeholders. This alignment with others and key areas for collaborative work will be detailed within the Product Development Service Plan.



Visitor Servicing

Visitor servicing for the Causeway Coast and Glens is much more than the provision of visitor information from enquires received via the counter and over the telephone/internet etc.

It offers that personal, authentic and friendly interaction, enhancing visitor satisfaction and enjoyment, encouraging a longer stay, repeat visits and a positive portrayal of the destination to others. The visitor servicing team links with the marketing function by assisting potential visitors to plan and book their visits to and within the wider region. Also planned is the generation and continual refreshment of localised tours and themed itineraries. Experienced input to developing these is paramount to success and will assist the numerous tourism operators to work together and 'cross-sell' bundled itineraries, making the product easier to access and promote.

Other key visitor servicing roles include:

- Collation of visitor satisfaction surveys and data for market intelligence
- Management and development of the area's wider interpretation programme
- Development of the conference/ incentive market
- Print Management
- Provide local hubs for trade liaison
- Assist marketing team with consumer shows, trade engagement and marketing campaigns



Measuring Performance

Overall performance of the visitor economy can be assessed through tourism data, measuring overnight trips made by Northern Ireland residents and visitors outside Northern Ireland. Derived from a variety of sources, information is published by the Northern Ireland Statistics and Research Agency (NISRA).

Key measurable outputs include:

- Number of trips
- Number of overnight stays
- Spend
- Origin of visit
- Reason for visit
- Levels of satisfaction

In addition to the measurable outputs set out in the strategy action plan the following targets for performance indicators have been set:

3% growth per annum in overnight spend in successive years from 2016-2020.

2% growth per annum in visitor numbers in successive years from 2016-2020

3% growth per annum in bed nights from outside Northern Ireland in successive years from 2016-2020

Both the Marketing and Trade Support service plans have identified need for the development of robust measuring techniques to assess trade communication/collaboration and marketing campaign success.

3%

GROWTH
OVERNIGHT
SPEND
PER ANNUM

2%

GROWTH
VISITOR
NUMBERS
PER ANNUM

3%

GROWTH
BED NIGHTS
PER ANNUM

IN SUCCESSIVE YEARS FROM 2016 - 2020



