

Collaborate **LO**cally to Compete **GlO**bally

Local Authorities Supporting Tourism



Local Authority Tourism Activity **2016**



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1. INTRODUCTION

- 1.1 The local government sector has traditionally played an important role in supporting tourism development of local areas. This included the provision of infrastructure, the development of tourist attractions and experiences, support for festivals and events and the implementation of tourist promotion plans. Tourism plans, policies and development objectives are core elements of the County and City Development Plans. Importantly, the sector mobilised a network of stakeholders including agencies, community groups and the private sector to invest in and promote their local tourist offering. These activities were driven by the ambition of each local authority to harness the development opportunity of areas throughout Ireland as places to live in, invest in and visit in a sustainable way.
- 1.2 In October, 2012 the Government published *'Putting People First: An Action Programme for Effective Local Government'*. Since then the sector has undergone significant reform. A key element of the reform of local government was the strengthening of role the sector plays in economic development. Tourism is recognised as an important driver of the local, regional and national economies, and therefore is a central component of the economic ambitions of all local authorities. The tourism objectives for each local area are clearly stated in each Local Economic and Community Plan (LECP) as outlined in Section Two. In March, 2017 each local authority launched the *Tourism Strategy Statements and Workplans*. These are aligned with the objectives of the LECPs. The Tourism Strategy Statements and Workplans are aligned with local, regional and national strategies and plans, in particular the *Regional Action Plans for Jobs* and the Government's tourism policy, *'People, Place and Policy: Growing Tourism to 2025'*.

THE ROLE OF LOCAL GOVERNMENT IN TOURISM

- 1.3 In parallel, the local government sector conducted significant research to establish the baseline of the role that the local government sector plays in tourism in November, 2016. The findings of this research are presented in this report. Highlights of the level of investment are set out in the paragraphs below.
- 1.4 Between 2011 and 2016, the local government sector invested **€73.3million** in tourist attractions throughout Ireland. This leveraged a total investment of **€170.9million** in the tourist experience nationally. In addition, in 2016 local authorities made an operational contribution of **€28million** to support the day to day operations of tourist attractions. This investment directly or indirectly supported **259 tourist** attractions. Plans are advancing for a further 121 new tourist products. Investment of c.€180.8million is required to bring these attractions to fruition. In 2016, **€21.6million** was invested in tourism infrastructure, including parking, signage, and walkways/blueways. Local authorities contributed €14.5million towards this investment. This includes **€3.8million** that was spent by local authorities on maintenance and management of beaches.
- 1.5 The local government sector has also contributed significantly to marketing, festivals and events. In 2016 the sector supported **1,403 festivals and events**, ranging in size and topic, but typically celebrating local assets and heritage.



The remainder of this report is set out as follows:

- **Section Two:** Provides an overview of tourism trends and the policy context;
- **Section Three:** Presents the findings of the survey in relation to **investment in tourist attractions**;
- **Section Four:** Provides an overview of the survey findings in relation to the level of investment made by local authorities in **infrastructure and innovation** to support tourism; and
- **Section Five:** Presents the findings of the survey relating to **promotion, festivals and events**.

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Local Authorities Supporting Tourism

2. CONTEXT

2.1 As stated in Section One, each City and County Council has prepared a Tourism Statement of Strategy and Workplan. These set out the tourism objectives for each local area, along with a work programme of investment and promotion that will be implemented by the local authority and its partners. The key objective of each Tourism Statement of Strategy and Work Plan is to strengthen the attractiveness of each region and local area to tourists. These Statements of Strategy were not prepared on a blank canvass, but have been written in the context of tourist trends and national, regional and local tourism policies, strategies and plans. This section provides an overview of trends and policies that have influenced the local tourism activities and investment priorities.

TOURISM TRENDS

2.2 Between 2010 and 2016 the number of trips to Ireland from overseas visitors increased by 58.7%¹. In parallel spend by overseas visitors to Ireland increased from €3.5billion in 2010 to €5.5billion in 2015². 2016 was a record breaking year for overseas tourism to Ireland³:

- At over 9.584 million visits, overall overseas trips to Ireland were up 10.9% in 2016 compared to 2015;
- Visits from Mainland Europe grew by 8.5% in 2016, to 3,302,100 visits;
- Visits from North America increased by 19.4% in 2016 to 1,808,000 visits;
- Visits from Great Britain were up by 10.6% in 2016 to 3,924,100 visits; and
- Visits from the rest of the world, mostly long-haul and developing markets, totalled 550,200 for 2016 representing an increase of 2.2% in the year.

2.3 In parallel there has been an increase in the number of domestic trips. The number of domestic trips increased from 8.2million in 2012 to 9.1million in 2015.

2.4 The Fáilte Ireland Tourism Barometer Business Sentiment Index showed strong sentiment in the tourism industry in 2016. While three quarters (76%) remained confident about business, the upward trend seen since 2010 did not continue. According to Fáilte Ireland, this may be attributed to uncertainty following the Brexit vote which has impacted expectations for 2017.⁴



¹ CSO Country of Residence Survey, 2017

² CSO TMA10: Estimated Expenditure by Overseas Travellers to Ireland by Type of Expenditure and Year

³ 2016 Record Breaking Year for Tourism, Department of Transport, Tourism and Sport, January 2017.

⁴ Tourism Barometer, Fáilte Ireland, December 2016.

REGIONAL DISTRIBUTION

- 2.5 Dublin attracts the majority of overseas tourists in terms of both numbers and spend. In 2015 almost 5million overseas tourists visited Dublin. The next most popular destinations for overseas tourists are Cork (over 1.4million overseas tourists), Galway (almost 1.4million overseas tourists) and Kerry (1million overseas tourists). Otherwise, the number of overseas tourists visiting other counties ranges from just under 600,000 to 30,000 visitors.
- 2.6 The destination of domestic tourists is more evenly spread across the country. That said, Dublin, Cork, Galway and Kerry remain the most popular destinations for Irish resident tourists.

TOURISM POLICY CONTEXT

- 2.7 The Tourism Statements of Strategy and Work Programmes are informed by relevant local, regional and local plans and strategies, specifically, the Government's tourism policy ***People, Place and Policy, Growing Tourism to 2025*** which was published in 2015. This sets out ambitious goals for tourism in Ireland:
- By 2025, revenue from overseas visitors, excluding carrier receipts, will increase to €5billion;
 - Employment in the tourism sector will be 250,000 by 2025, compared with c.200,000 in 2015; and
 - Target 10 million visits to Ireland annually by 2025.
- 2.8 Focussing on local government, People, Place and Policy commits to ***“an enhanced role for local authorities and recognition of the contribution of communities to tourism”***⁵. Specifically, the policy envisages that local authorities will:
- Continue to act as primary developer of a range of public tourism infrastructure, including outdoor tourism infrastructure and urban and rural heritage;
 - Act as a link between the State tourism agencies and communities by supporting community effort with regard to major national tourism initiatives;
 - Support community effort in destination development, including assisting communities to align their efforts with the tourism agencies brand architecture and consumer segmentation model;
 - Provide a competitive environment for tourism enterprises through continued focus on high quality maintenance of public infrastructure frequently used by visitors;
 - Contribute to capacity building in tourism nationally by co-ordinating exchange of knowledge between established and developing tourism destinations; and
 - Provide a range of advice and support through the Local Enterprise Offices.

⁵ Department of Transport, Tourism and Sport (2015) *People, Place and Policy, Growing Tourism to 2025*, pp10

2.9 Subsequently, the Department of Transport, Tourism and Sport published the **Tourism Action Plan 2016 - 2018**. The local government sector is a key partner in relation to the Action Plan, and welcomes the opportunity to participate on the Tourism Leadership Group. The sector has advanced the actions assigned to local government under the Tourism Action Plan:

- A Tourism Sub Committee has been established under the auspice and direction of the County and City Management Association (CCMA);
- Each local authority produced a Tourism Statement of Strategy and Work Programme;
- A seminar promoting the role the local government sector plays in tourism has been organised for March, 2017.

PLAYING A REGIONAL ROLE

2.10 The Department of Jobs, Enterprise and Innovation, in partnership with a range of agencies and Government Departments, publishes the annual **Regional Action Plans for Jobs**. The implementation of these actions plans is driven and coordinated by local authorities working collectively in each region. Each Regional Action Plan for Jobs contains a suite of actions designed to stimulate economic activity in their respective regions. All Regional Action Plans for Jobs contain actions designed to improve the attractiveness of the region to tourists. This reflects the acknowledgement by the local government sector of the importance of collaboration regionally. There are many examples of regional cooperation by local authorities in terms of investment, access, branding and promoting specific sectors.

2.11 The regional approach to economic development will be further underpinned with the publication of the **Regional Economic and Spatial Plans** by the Regional Assemblies. These plans will provide detail on the investment priorities for each region and will be aligned with the **National Planning Framework: Ireland 2040 Our Plan**.

DELIVERING LOCALLY

2.12 A Local Economic and Community Plan (LECP) has been prepared for each county and city areas throughout Ireland. The implementation of the LECPs is being overseen by the Local Community and Development Committee (LCDC), which is a committee of the local authority. The 31 LECPs commit to 5,037 actions in the areas of economic development, social inclusion, community development, health and wellbeing, rural and urban regeneration, investment and infrastructure. 1,701 organisations are mobilised locally to deliver these actions.

2.13 Focussing on tourism, the LECPs set out clear objectives, specific goals and actions to support the tourism sector of each county. These objectives formed the basis for the Tourism Statement of Strategy and Work Programme which has been prepared by each local authority. Alignment of these tourism strategies and plans with the LECP is important in terms of ensuring that there is a framework for the delivery and monitoring of the objectives of the Statements of Strategy via the LCDCs and ultimately by the elected members of each City or County Council.

3. LOCAL GOVERNMENT INVESTING IN TOURIST ATTRACTIONS, 2011-2016



INVESTMENT IN TOURIST ATTRACTIONS

3.1 The local government sector makes a significant contribution to the development of the tourist experience in each local area. The survey found that in 2016 local authorities directly run or provide support to 259 tourism attractions, of which 143 are directly run by the local authorities and 116 of these attractions are operated by the private or community and voluntary sectors with the support of the local authority. There is great variety in terms of the types of attractions that are run or supported by local authorities. These include historic houses, castles, gardens, forests, parks and geoparks, blueways and greenways, visitor and interpretive centres, museums, arts centres, theatres, galleries, lighthouses, historic forts, islands, heritage centres, waterfalls, round towers and habitat trails.

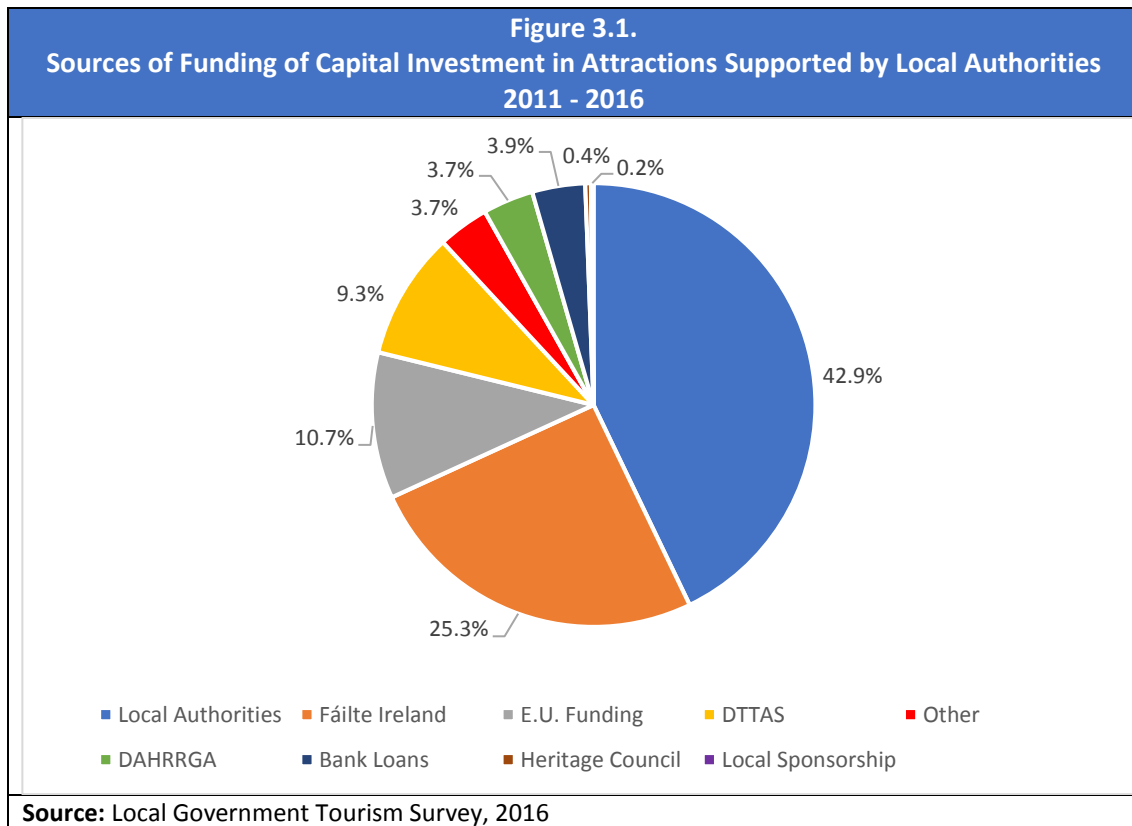
<p>Attractions include historic houses, castles, lighthouses, forts, art centres, galleries, heritage centres and habitat trails.</p>	<p>Local authorities directly run or provide support to 259 tourism attractions.</p> <ul style="list-style-type: none"> o 143 are directly run by local authorities o 116 are supported by local authorities o 140 are free of charge
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3.2 In the period 2011-2016, a considerable capital investment was made by local authorities in the development of the tourist experience and attractions. In that period, local authorities leveraged a total capital investment of c.€170.9million in tourist attractions, with €73.3million of this investment made by local authorities while the matching €97.6million capital investment was made by other stakeholders⁶. This highlights both the important contribution made by local authorities in the development of the tourist experience and the importance of collaboration and cooperation between local authorities and a range of other stakeholders, including local communities, the private sector, Government departments and agencies to improve the visitors’ experience.

Capital Investment in Attractions (2011-2016)



⁶ This represents investment made by local authorities in tourist attractions, with matching funding from other sources. This excludes investments made in tourist attractions by the other stakeholders independently of local authorities.



- 3.3 It is important that these tourist attractions are sustained. According to the survey, **140 of the attractions are free of charge**. In that context, local authorities made an **operational/revenue contribution** to attractions of **€28million** in 2016 in addition to the capital contribution outlined above.

CONTINUED INVESTMENT

- 3.4 The survey found that local authorities have plans for over 121 new tourism projects and initiatives that will require c.€180.8million in investment to turn them into reality. The projects are at different stages of development. Some of these plans are already well progressed and will open in 2017. Other tourism projects are at various stages of planning. Prospective tourism projects for local authorities include developing walking routes, greenways and blueways; installing new Wild Atlantic Way discovery points; providing new parks; restoring and conserving historic houses, estates and heritage projects; building new visitor centres; creating new museums; improving and providing caravan and camping facilities; developing angling, river and marina attractions; expanding sports facilities and implementing new promotion initiatives.

Local authorities made an operational/revenue contribution to attractions of **€28 million** in 2016.

Future Investment: 121 new tourism projects and initiatives that will require c. **€180.8 million** investment to turn them into reality.

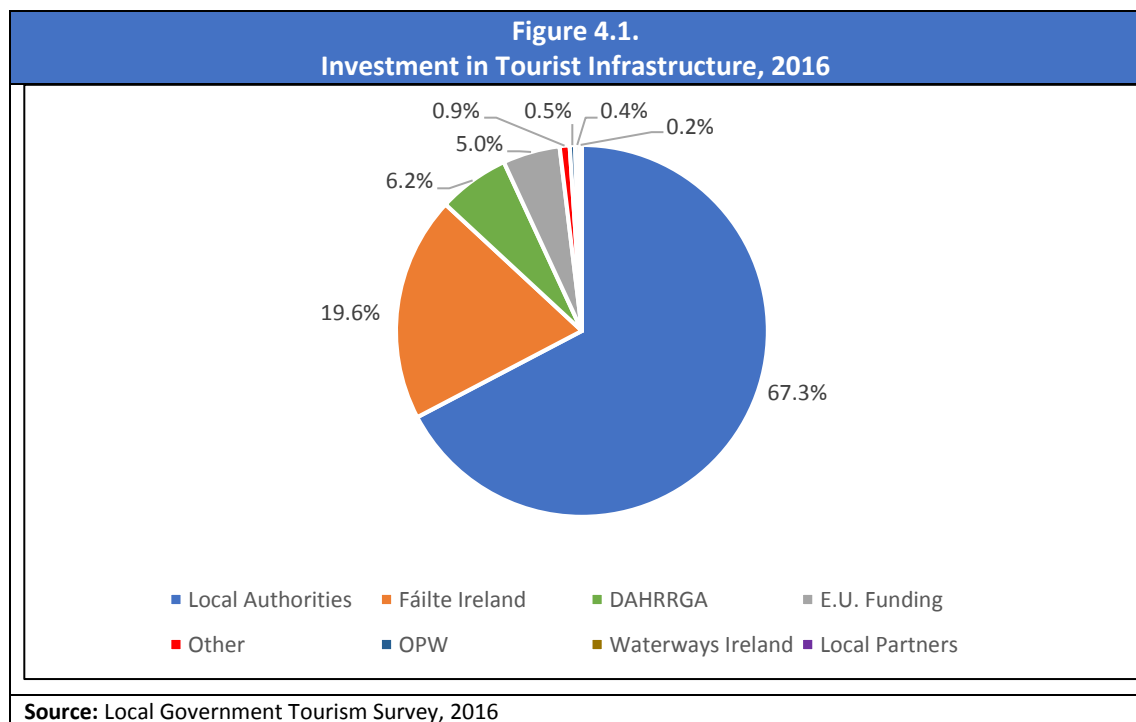
4. LOCAL GOVERNMENT DELIVERING INFRASTRUCTURE & INNOVATION, 2016



4.1 The survey found that local authorities deliver to help to improve the enjoyment and interpretation by tourists of local attractions.

INFRASTRUCTURE

4.2 The types of infrastructural work local authorities conduct includes maintaining beaches, installing signposts, map boards, interpretive and tourist information panels; building car parks and viewing points; constructing and maintaining walks and trails; erecting bus shelters at tour stops and investing in key pieces of travel infrastructure such as ferry services and airports. Much of the signage that local authorities install is supporting national brands, in particular the Wild Atlantic Way or Ireland’s Ancient East, which are rolled out in partnership with Fáilte Ireland. In 2016, local authorities harnessed investment in tourist infrastructure of c. **€21.57million**, of which **€14.49million** was provided by local authorities and €7.08million from a range of other sources⁷, including €3.8million for the management of beaches.



⁷ This represents investment made by local authorities in tourist infrastructure with matching funding from other sources. This excludes investments made in tourist infrastructure by the other stakeholders independently of local authorities.

SUPPORTING INNOVATION



4.3 The local government sector recognises that the needs and priorities of tourists continuously evolve. A wide range of innovative tourism products are being delivered or supported by local authorities such as interactive and multilingual apps; interactive maps; digital interpretation; electronic tourist information kiosks; the digitisation of historic papers; and 3D virtual reality/historic experiences.

Local authorities are working to provide a modern, high-tech tourism experience.

- 61 innovative tourism projects

4.4 The survey found that local authorities continue to innovate to provide a modern tourist product. In 2016, a total of c.€2million was invested in 61 innovative tourism projects, of which local authorities provided **€0.9million** and €1.1million came from a range of other sources.



5. LOCAL GOVERNMENT SUPPORTING TOURISM PROMOTION, FESTIVALS AND EVENTS, 2016



5.1 Following investment in tourism attractions, experience and infrastructure, local authorities and local communities work to promote their local areas to domestic and overseas tourists. This is often undertaken in partnership with Tourism Ireland and Fáilte Ireland consistent with national and international tourism marketing campaigns. As outlined below, a range of approaches are used to promote local areas, from organising festivals and events, to implementing targeted promotional campaigns.

EVENTS



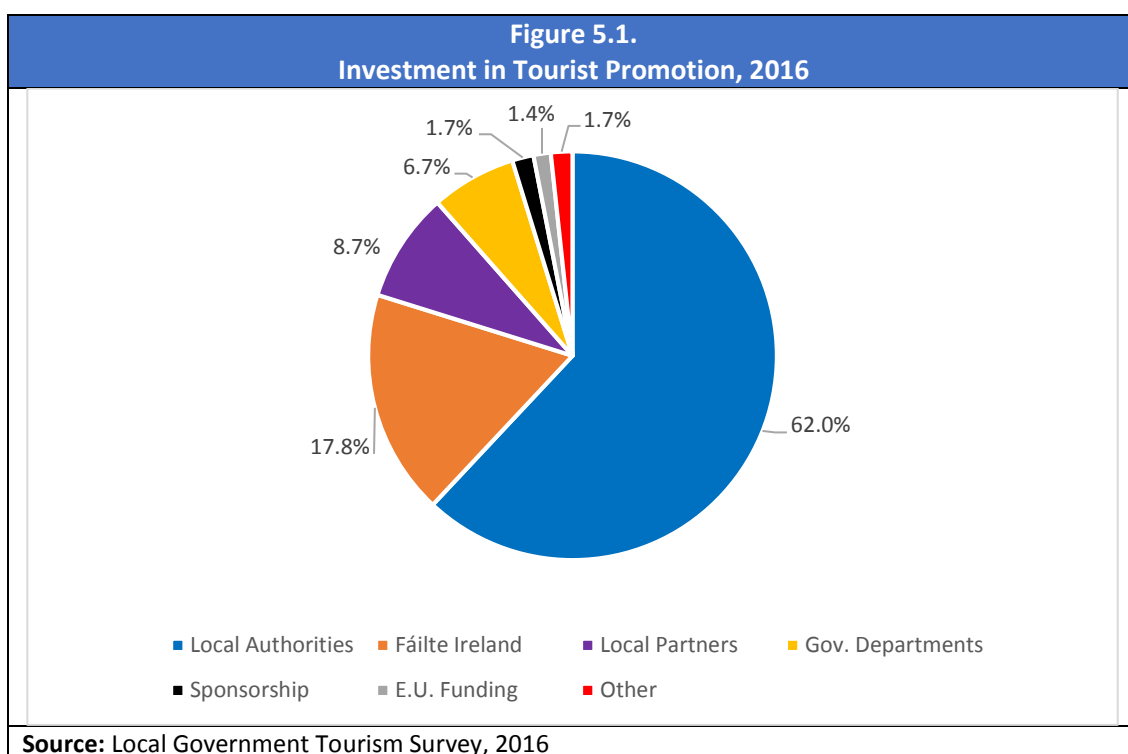
5.2 Festivals and events are recognised as an excellent means by which local communities can celebrate local assets, strengths and history, while taking a targeted approach to attracting visitors. Local authorities provide significant contribution to local events. In addition to financial contribution, as outlined below, local authorities support events by allocating staff resources, road closures, provision of staging areas, the erection of signage, traffic management and car parking, additional bin collection and street cleaning, health and safety support, event management, marketing and publicity, licensing, training and administrative support. The survey found that local authorities support 1,403 events. In 2016 local authorities contributed c. **€14.9million** towards events within their communities.

<p>Support from local authorities includes event management, traffic management, health and safety, promotion and marketing, cleaning and licencing.</p>	<ul style="list-style-type: none"> ○ 1,403 events are run directly or supported by local authorities. ○ 132 events run directly by local authorities ○ 1,271 events supported by local authorities ○ €14.9 million of financial support by local authorities
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PROMOTION

5.3 The survey found that local authorities are working with a range of partners to promote their local area and wider region. Local authorities leveraged spend of c.€7.3million on tourism promotion in 2016. Of this, €4.3million was provided by the local authorities and €3million was provided by a number of stakeholders⁸.



5.4 Types of marketing activities undertaken by local authorities includes: supporting local tourism organisations to bring local tourism stakeholders together to enhance tourist offering and promotion; investing in national and international marketing campaigns on TV, radio and online; providing marketing funds for routes to airports and ports; promoting tourist offerings to cruise companies; attending consumer and trade fairs abroad; running tourist information offices; holding conferences and events for tourism stakeholders; creating local multi-lingual maps, guides and brochures; creating libraries of promotional images, videos and drone footage; setting up familiarisation trips for journalists and travel companies; pitching to and supporting the production of travel television programmes; and creating local tour group itineraries. A significant amount of the marketing done by local authorities is in support of national brands such as the Wild Atlantic Way, Ireland’s Ancient East and Dublin: A Breath of Fresh Air.

⁸ This represents funding provided by local authorities in to promote tourism, with matching funding from other sources. This excludes funding provided for tourism promotion by the other stakeholders independently of local authorities.

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