Derry City & Strabane
District Council
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Derry City & Strabane District

Tourism 2018~2025

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A New Level of Ambition

tourism northernireland

Contents

Derry City & Strabane District Council Tourism Strategy 2018~2025: A new level of ambition

Tourism is growing globally and is projected to continue growing. There is an increased ambition for tourism as an economic driver within Northern Ireland and Derry City and Strabane District Council in the Strategic Growth Plan. It has highlighted tourism as a key sector for economic growth and jobs.

Derry City and Strabane District Council area comprises the second largest city in Northern Ireland and the fourth largest city of the island of Ireland. Derry~Londonderry is the 'Capital of the Northwest' and is at the core of the only functional economic city region of scale which straddles the border into the Republic.

Further to this it is recognised as **a standout heritage destination**. The historic and dynamic university city of Derry~Londonderry, is unique on this island. The Walls, the built heritage, world class creativity and culture evoke the epic stories rooted here, and combine to give a special sense of place.

It doesn't stop there. In no time, visitors can be in villages, amongst hills or alongside picturesque rivers. There is much to do in the city and the rural hinterland. This is a destination with huge potential that will inspire the visitor and deepen a sense of pride in local people.

A special location

Located where **the Wild Atlantic Way meets the Causeway Coastal Route** the area is perfectly placed to be a hub for exploring dramatic coastlines and Ireland's North West.

A time for action

The strategy includes a three year action plan with over 60 actions across Product and Experience, Visitor Servicing and Destination Marketing themes. This needs strong leadership and can only be delivered by government and industry working together. It also requires investment – both capital and revenue, public and private.

A Tourism Delivery Partnership has been established to oversee the progress of the strategy.

The strategy aims to **double visitor spend to £100m by 2025** and will enable the headline goal for the strategy – **JOBS**.

The strategy will help sustain the 4685 jobs currently supported by the sector, and will create approximately **1000 additional jobs**.

Introduction

Tourism is growing globally and is projected to continue growing. There is an increased ambition for tourism as an economic driver within Northern Ireland and Derry City and Strabane District Council in their Strategic Growth Plan, has highlighted tourism as a key sector for economic growth and jobs. Derry City & Strabane District's Inclusive Strategic Growth Plan 2017 – 2032, has set out a vision of **'a thriving, prosperous and sustainable city and district with equality of opportunity for all'** with a mission **'to improve the social, economic and environmental wellbeing of the city and district and to do so in a sustainable way'**.

As a result of this process, a number of outcomes and actions have been identified under three pillars;

Economic Pillar • Environmental Pillar • Social Pillar

This new approach has a number of cross cutting themes: Equality and Inclusive Growth, Good Relations, Sustainability and Rural Development. Tourism sits under the Economic Pillar, with the first step being to develop a tourism strategy and action plan. This strategy will not only help to deliver the outcome, "We live in the cultural destination of choice" offering "world class visitor experiences", but will help to guide the tourism sector through the development and promotion of a unified regional offer and represents an opportunity for Derry and Strabane to make an impact by increasing the level of employment as well as GVA.

The Global Importance of Tourism

Tourism is Growing Globally

Tourism internationally is a growth industry and it is expected to continue growing with the out-of-state visitor market showing greatest potential, set to increase 3-4% year on year, so that international travellers will total almost 1.6 billion by 2025.

Key statistics

1.2 BILLION global travellers in 2015, an increase of **OVER 50%** in the **PREVIOUS 10 YEARS**

GROWTH RATE
year on year (expected):
2.2% in advanced economies
4.4% in emerging destinations

Tourism Trends

The Council area is part of this global ecosystem, hence the strategy must take account of key consumer and industry trends which indicate that:

- Visitors are looking for **authentic experiences** that will help them connect emotionally and memorably with cultures and destinations
- Technology – Its influence and role continues to grow. For example, in the case of consumers, they increasingly want to **research, select, book, pay, share experiences and review online**
- Visitor segmentation research has helped with understanding visitor preferences. However how might this evolve and how the lack of access potentially causes a challenge? For example, **emerging markets** e.g. Asian, and most notably the Chinese, are projected to continue growing for years to come
- Challenges – From the role of the sharing economy through to traveller security are examples of **evolving challenges** that can and will affect traveller trends
- **Brexit** - While the results of Brexit will have differential geographical impacts across the UK and Ireland, what will the effect on the North West Region of Ireland in relation to tourism trends? Fluctuating access and the perception of accessibility may both impact positively and negatively.

Competition is Increasing

Tourism is an increasingly competitive environment. New destinations are emerging regularly. Existing destinations and new destinations, nationally and internationally, are competing using levers of difference (what are the experiences that are unique to this place?), quality (what elements of quality could set this place apart? – and price demonstrating value for money is critical for many visitors).
For the Council area, this consideration of competition has two dimensions:

1. **How does the area add to Ireland's offering to compete internationally?**

2. **How does the area stand out in order to compete within the island and attract visitors?**

Tourism is growing from a low base

Northern Ireland's tourism industry has experienced significant growth in recent years. From a very low base little more than a decade ago, tourism has become a key sector for economic growth in Northern Ireland.

Tourism is an economic driver recognised in policy

Tourism has potential to drive economic growth and this is gaining further recognition through the NI Executive's Draft Programme for Government (2016 – 2021) and Draft Industrial Strategy. This growth will:

▶ GENERATE WEALTH ▶ CREATE EMPLOYMENT ▶ SUSTAIN COMMUNITIES

Recognising the economic importance of tourism and the potential to grow the tourism industry into a high-performing export-led sector

NI EXECUTIVE'S DRAFT PROGRAMME FOR GOVERNMENT (2016 - 2021)

Developing an internationally competitive and inspiring tourist destination of which our community can be proud

NI EXECUTIVE'S DRAFT PROGRAMME FOR GOVERNMENT (2016 - 2021)

Our aim is for an internationally competitive tourism sector, based upon an inspiring visitor destination of which we are all proud, with an ambitious goal to double external revenue to £1 billion by 2025. In doing so we will also contribute to other priorities by supporting local communities and creating regionally dispersed employment opportunities'

NI DRAFT INDUSTRIAL STRATEGY 2017

There is an emerging strategy for accelerating tourism growth across NI

Increasing the economic output of the tourism sector is integral to the draft Programme for Government and the draft Industrial Strategy.

A draft tourism strategy for Northern Ireland was developed during 2016 and aims to be more competitive internationally. While still to be published, a recent interview with the Tourism NI CEO has set out the ethos underpinning the draft strategy and its key elements.

The strategy recognises the importance of the domestic market especially for certain parts of Northern Ireland and during the off-season, however notes there is limited potential overall for growth domestically. Therefore, to develop the economic benefit that tourism can bring, there needs to be increased focus on growth from external markets. With the aim being more people will visit Northern Ireland, stay longer and spend more.

Key elements within the draft strategy include:

- **Market focused** – Understanding target markets and target groups. With greater clarity on who is targeted, develop products and marketing to best meet their needs and demands.
- **Marketing proposition of scale** – Development of a compelling marketing proposition of scale, linking together Northern Ireland's key visitor experiences.
- **Experience based** – Development of new, compelling world class experiences to meet visitor expectations. This can also mean the packaging of experiences so that visitors get an itinerary of local stories and cultures which they can be part of and engage with.
- **Investment in product development** – Investment in cultural and heritage assets is critical given the importance of the 'culturally curious' market segment. A Strategic Framework for Culture and Heritage Tourism is currently being developed by Tourism NI focusing on how to further unlock the potential of the heritage base, as well as the critical role of the cultural, arts and creative sectors in animating the heritage product. This is also linked with the integration of new technologies, for example augmented reality, which could enhance the visitor experience.
- **Commercial focus** – Supporting businesses within the sector to develop capacity and innovate. This also references the potential for publicly run attractions to become more commercial in character.
- **Digital skills** – Enhanced capabilities around digital marketing, communication with visitors, provision of information and data collection that can continually shape products and services to better meet visitor demands.
- **Building a skilled and capable industry** – Strong industry leadership, highly skilled workforce and excellent digital, sales and marketing capabilities. A NI Tourism Skills Action Plan has been developed – albeit it is yet to be released at time of writing.
- **Access** – Supporting increased direct air access from key markets.
- **Building Northern Ireland's reputation as a destination for events** – The hosting of world class events and growing internationally successful indigenous events.

A step change in confidence

The UK City of Culture in 2013 embedded a new high-level watermark in terms of confidence for the city and region, with up to one million visitors and participants across over 400 events. Investment in the Alley Arts and Cultural venue, Guildhall, First Derry Presbyterian Church and Blue Coat School, St Columb's Cathedral, Ebrington Square and the Peace Bridge are all tangible signs of new confidence. More recently there has been further investment, notably including the private sector, with announcements and development relating to the Quiet Man Whiskey Distillery, new hotel developments, as well as Council's proposed investment in the development of the Maritime Museum.

To further support this development, Council now has the opportunity to utilise planning powers in order to identify our tourism assets across the District, seek to safeguard these key assets and also to accommodate future tourism in a positive and focused, yet sustainable manner across the District. The Strategic Growth Plan and the Integrated Economic Strategy have highlighted the importance of tourism in terms of creating and sustaining jobs as well as the positive impact that it has for communities. While the majority of tourism related jobs are concentrated in the city, the positive impact is more widespread; one in five jobs in the city are held by people from what was the Strabane District Council area. Therefore investing in and growing tourism will deliver benefits for the whole region.

There is room for growth

Since 2011 the Council area has increased its market share of overnight trips (+4%), nights (+5%) and expenditure (+5%) to +6% for each of them in 2016 and positively 62% of overnights were from Out of State visitors which is well above the Northern Ireland average (53%) and equated to a revenue of £36.5m Available figures also show however that the council area currently has a relatively low market share in terms of overnight trips, nights and expenditure and there is potential to grow this market share significantly.

Reason for visit:

30%
of visitors to the Council area were here for
HOLIDAY, PLEASURE, LEISURE
(lower than the NI average of **47%**)

53%
of visitors are visiting
FRIENDS & RELATIVES
(above the NI average of **41%**)

11%
visited for
BUSINESS
(above the NI average of **9%**)

Accommodation and occupancy rates:

Overall data indicates a strengthening hotel market, while bed & breakfast and self-catering units appear to be doing less well.

There were **12 HOTELS** with **690 ROOMS** in 2016, which is ranked **3RD** in **NORTHERN IRELAND** after Belfast and Causeway Coast & Glens

The room occupancy rate was **65%**, the strongest occupancy since 2013, which was **68%**. We also ranked **3RD** after Belfast **(79%)** and Mid & East Antrim **(67%)**

The area had **61 BED & BREAKFASTS** with an occupancy rate of **29%** in 2016, below the NI average of **34%**

The area had **103 SELF-CATERING UNITS** which experienced **33%** occupancy in 2016, below the NI average of **36%**

Tourism is a key sector for jobs

Employment in this sector is growing faster than non-tourism jobs in Northern Ireland with an 11% increase from 2013 to 2015, equating to 458 new jobs. Consideration needs to be given to the image of this sector as a career choice by highlighting increasing opportunities for higher entry jobs.

The 4,685 tourism jobs in the area make up 8.7% of total jobs, marginally above the NI proportion of 8.5%.

Employee Jobs in Tourism (NISRA LGD Tourism Data)

	ACCOMODATION FOR VISITORS	FOOD & BEVERAGE SERVING ACTIVITIES	TRANSPORT	SPORTING & OTHER RECREATIONAL ACTIVITIES	OTHER	TOURISM JOBS	NON-TOURISM	TOTAL
DERRY CITY & STRABANE	716	2,698	154	779	338	4,685 (8.7%)	48,945 (92.3%)	53,630
NORTHERN IRELAND	10,233	35,537	3,763	7,504	4,226	61,263 (8.5%)	655,842 (92.5%)	717,105
% Change 2013 - 2015								
DERRY CITY & STRABANE	*	16%	*	25%	1%	11%	6%	7%
NORTHERN IRELAND	2%	8%	6%	5%	-3%	6%	4%	4%

The current offering is strongest in relation to heritage and culture

The area boasts a remarkable heritage, of which the historic City Walls are the most striking feature. The built heritage evokes epic stories including:

- **One of Ireland's earliest monastic settlements**
- **A key Plantation hub – with the 400 year-old Walls and associated heritage**
- **A rich maritime and industrial heritage and a gateway to the world as a key emigrant port**
- **Recent narrative of conflict, civil rights and peace building**

While already offering a well-developed heritage experience, the City has potential to be the stand-out heritage destination on the island, and should continuously improve existing attractions and experiences to develop the overall heritage experience. While recent steps have been taken to develop the Maritime Museum, there remains heritage with unlocked potential both in the city and the rural hinterland.

There is a strong cultural vibe, often connected to our heritage. This cultural renaissance that has taken place in recent years has demonstrated the area as a cultural hub which hosts world class events and festivals throughout the year.

The Value Of Walls: Inspiration From Elsewhere

York welcomes almost **7 million visitors** each year and the **£564m visitor spend supports 19,000 jobs** in the City. A City with built heritage as its core tourism asset has seen significant growth in the last five years, with visitor numbers up by 6% and spend by 25%. Currently an applicant for World Heritage Status, York also offers an official sightseeing card that allows visitors to save time and money.

The French town of **Carcassone** is a UNESCO World Heritage Site and attracts **3 million visitors** each year. Tourists arrive to explore its long history, using the City Pass to get the most out of the city for the best prices, including the medieval town with its 52 towers and 2 miles of double, concentric walls.

Another UNESCO World Heritage Site is **Dubrovnik** in Croatia, welcoming over **1 million visitors** in 2016, with significant celebrations at New Year's Eve. The ancient city walls are the topped ranked attraction on TripAdvisor and are included in the 1, 3 and 7 day tourist pass.

The Medieval Old Town of **Tallinn** in Estonia is an Old Hanseatic League city and a UNESCO World Heritage Site that was the European Capital of Culture in 2011. **3 million overseas visitors** come to the city each year, which is known for its strong digital and environmental presence. Tourists engage with the built heritage and culture through a very busy cultural events calendar and the visitor pass, TallinnCard.

Visitors to the island

A total of **10.3m visitors** were welcomed to the island of Ireland in 2016 **up 9% from 2015** and this growth is expected to continue.

46% came for a holiday **33%** came to visit friends and/or relatives

16% came for business reasons **Total overseas revenue: £4.3bn**

Great Britain market contributed 28% of revenue, the U.S. 23% Germany 8% and France 5%

Market research has identified the priority customer segments who visit the island of Ireland:

SEGMENT	FROM	CHARACTERISTICS
SOCIAL ENERGISERS	GB	15 - 34 groups and couples, action packed, fun-filled, city plus, adventure in the city
GREAT ESCAPERS	GB	30+ couples getting away from busy life, attractive and easy access, clustering of activities important
CULTURALLY CURIOUS	GB	40+ history & culture, immersing themselves, discovery and authenticity
MATURE COSMOPOLITANS	NI / ROI	Older age group, frequent breaks, non-digital
TIME TOGETHER	NI / ROI	Couples romantic weekends, food important, special offers
FAMILY FUN	NI / ROI	Families with kids, focus on children, family activities
YOUNG & LIVELY	ROI	15 - 34 urban breaks with friends, key is nightlife and events, looking for good time

Source: This segmentation was initially used within the 'GB Path to Growth' by the Tourism Recovery Taskforce (2012)

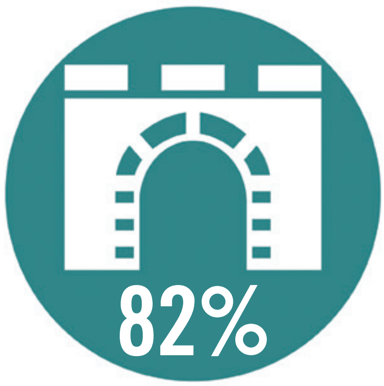
Estimated average overnight trips taken in Derry & Strabane

2015 statistics obtained from NISRA	3 YEAR AVERAGE (2011 - 2013)		3 YEAR AVERAGE (2014 - 2016)	
ORIGIN OF VISITORS	%	NO. OF TRIPS	%	NO. OF TRIPS
NORTHERN IRELAND	37	72,361	38	92,449
GREAT BRITAIN	37	72,649	36	88,663
OTHER (INC. REPUBLIC OF IRELAND)	11	20,763	11	26,188
MAINLAND EUROPE	9	17,349	9	21,930
NORTH AMERICA	6	12,541	7	16,665
TOTAL		195,663		245,895

Although there is potential to grow the domestic Northern Ireland market, it is relatively finite and long term growth is likely to prove unsustainable. The Republic of Ireland market would appear to have more significant growth potential. Neighbouring Donegal receives over five times the number of European and over three times the North American visitors than the Council area, demonstrating the potential for significant growth.

50% of out-of-state visitors to the Council area also took a trip to the Causeway Coast and Glens, and 80% also visited the Republic of Ireland, highlighting the City is often part of a travel itinerary taking in other areas. Due to the strong history and cultural offering, the area, in particular the City, has been most successful at attracting the 'culturally curious'. However, further development of tourism product and experiences, both in the city and rural hinterland, will help to grow the market for the other segments.

visited the area to find out stories, history and legends



of all visitors include a visit to the City Walls

of visitors are currently aged over 55 and most are travelling without children

How are the visitors travelling?

Visitors are primarily travelling independently, albeit with a minority coming via coach tour operators. Visitors will come through Dublin, Belfast or City of Derry airports as well as sea ports. There is also an emerging cruise ship market that is including Derry on its itinerary.

Attract more visitors to stay overnight

There are issues which with greater attention and investment can become opportunities. There is a challenge in relation to getting more people to stay in the area overnight and to stay for longer. Currently, many visit for a short period, maybe taking a tour of the Walls before moving on to stay elsewhere.

A significant proportion of visitor spend relates to where people stay overnight including evening meal, entertainment and accommodation.

Currently however, there is evidence that the night time economy, access, accommodation and seasonality could strengthen further.

- **Evening economy:** If visitors are going to stay overnight there are always ways in which to develop their evening experience. These include further developing the food and drink experience, entertainment to appeal to international markets, lighting, animation, opening hours and availability of taxis.
- **Access**: Road connectivity is in need of substantial investment. The development of the A5 and A6, as well as visitor parking for coaches and campervans, needs further attention. Also, plans for the development of a new multi-modal transport hub for the city and greenway network indicate commitment to connectivity by bus, train and bicycle.
- **Accommodation:** Hotel capacity is limited at peak times of the year and is constraining the number of potential overnight visitors. The industry has started to respond to this challenge, with new hotel developments planned for the city over the next few years. This should increase capacity by around 300 bedrooms. Self-catering and B&B's, many in rural areas, are under-occupied compared with NI averages.
- **Seasonality:** Linked to accommodation capacity, there remain challenges relating to seasonality and the need to drive overnight visitor numbers, particularly in winter months.

Work together to improve visitor experience

In the city there are many visitor attractions that are in close proximity often with interlinked stories, which vary in size, operation, quality and promotional capabilities.

Stronger collaboration, joined up thinking on investment and better curation of the overall experience is needed to raise the bar for all. Currently many of the visitor attractions in the Council area are free of charge or have a very small fee. In 2016, nine of the top ten attractions in the area were free. Therefore it is likely that many visitors are only getting to sample parts of the story and will not contribute as significantly to the economy if they are not staying overnight. These issues of coherence and sustainable pricing are connected issues, ripe for consideration if tourism is to be a provider of jobs and wealth for the area, and if the overall Walled City experience is to be truly valued.

In the rural areas working together to develop capabilities and product, including clustering and cross-selling of experiences is critical to the development of the rural offering.

Use technology

In the development of this strategy a survey of tourism stakeholders put digital skills at the top of the skills agenda. We know the consumer increasingly expects to research, book, pay, share and review online. Strengthening the digital capability – including the basics - among those working in the sector is key to meeting visitor expectations.

Given the highly competitive environment it is essential to continuously improve visitor experiences, including in existing attractions by using technology, for example, virtual and augmented reality. With continuing technological advances this sector needs to be responsive and adaptable. In a destination boasting a University City at its heart, application of innovative technology should strengthen the visitors' experience.

Invest in marketing

Investment in marketing with the purpose of influencing, informing, or persuading a potential buyer's purchasing decision is an essential part of the tourism supply chain. Without this no-one will hear about what the area has to offer.

Return on marketing investment can be very significant. For example, Tourism Ireland's (ROMI) 2012 study found a 20:1 return on marketing investment and that the marketing influenced both holidaymakers and those visiting friends and relatives.

Locally, while previously there was a significant investment in marketing aligned to the 2013 UK City of Culture, there is currently a very limited investment in destination marketing. If there are expectations of tourism as an economic growth driver for the area, there needs to be a realisation as to the need for a comparable investment and commitment from both the public and private sectors.

A marketing proposition of scale is being developed that will link Northern Ireland's key visitor experiences. This will complement other experience brands on the island, including the Wild Atlantic Way and Ireland's Ancient East and will be a significant campaign over coming years. This will be a key asset for Derry & Strabane and it is critical that the area's marketing efforts align strongly with this.

Develop the rural offering

Another issue is the contrasting baseline between the city, which is relatively developed in terms of tourism product and capacity, and the rural hinterland, which is much less developed. The rural hinterland receives approximately one tenth of the visitor spend that occurs in the city. Additionally, the accommodation, largely B&Bs and self-catering, achieve lower levels of occupancy than the NI average.

That said, many ingredients are there for longer term opportunities: a beautiful natural offering including the Sperrins, rivers and the loughs, historic villages and heritage houses.

Currently there is a limit to the things to do and accessibility can be difficult. Therefore, development of activities and adventure alongside the heritage experience has merit, albeit developing this to a critical mass will take time and investment.

Turn our location into a strength

There is potential to turn the area's location into a strength. For example, The Walled City – where the Wild Atlantic Way meets the Causeway Coastal Route. This provides a special opportunity to act as a hub for exploring, serving visitors who wish to explore the two iconic driving routes and return to the city in the evening to enjoy the unique atmosphere the historic Walled City has to offer.

There is also potential in becoming a hub for accessing international golf courses and screen tourism, such as 'Star Wars' and 'Game of Thrones'.

A headline destination brand with supporting propositions

There is reason for confidence. The area, and in particular the historic university city of Derry-Londonderry, is unique on this island. Alongside the Walls, the built heritage and all the epic stories, there is creativity and culture. Together these combine to give a special sense of place.

It doesn't stop there. In no time, visitors can be in villages, amongst hills or alongside picturesque rivers. There is much to do, in the city and the rural hinterland, however this is a destination with huge potential that will inspire the visitor and deepen a sense of pride in local people.

The Walled City

The primary offering around the council area is the history and heritage experience that reaches back throughout the centuries. At the heart are the Walls which have served as a stage on which history has played out for 400 years. The strength of this core attractor, and its role as a gateway to the overall experience, has been demonstrated through market research and consultation.

Derry's Walls / Walled City:

- **5th largest attraction in NI with 403,000 visitors in 2016**
- **82% of visitors to the area visit the Walls**
- **#1 attraction on Trip Advisor for Derry**
- **Primary research & consultations identified the Walled City as our key asset**
- **The only intact Walled City on the island of Ireland**

The Walls should be recognised as an incredible asset and all should feel a sense of ownership and pride over it. The Walls are not the end of the story, and while they should be at the heart of promoting the region, it should be linked to a range of imagery and words that will bring the Walls and the region to life. For example:

Where the Wild Atlantic Way meets the Causeway Coastal Route

To sit as the meeting point between the Wild Atlantic Way and the Causeway Coastal Route offers huge potential. Embedding the destination as a meeting point of two established and powerful brands brings opportunities, from product and experience development and visitor servicing through to destination marketing. This also means enhanced partnership working with stakeholders in Donegal and on the Causeway Coast.

A destination for exploring the North West

Promoting the historic Walled City, not just through the products and experiences available within the city, but as a hub for exploring Ireland's North West. This is about more visitors staying overnight, enjoying a distinctive and vibrant Walled City experience, after returning from the tranquillity and beauty of the rural hinterland of the Sperrins or Donegal, or exploring the Wild Atlantic Way and the Causeway Coastal Route.

Accessibility, capacity and outstanding visitor servicing is key to developing the city as a hub, and while there have been a number of developments to help address these issues, there is more to do in becoming the first choice hub for visitors to the North West region.

3 core supporting propositions

History & Heritage

Using our assets to explore the epic stories of this place throughout the centuries; from the monastic settlements, through the various Irish, British and European conflicts, the industrial revolution, the diaspora that have emigrated and the more recent conflict, civil rights and peace building.

There are several established museums, venues, trails and events which help tell these stories, not only in the city but throughout the villages and rural hinterland.

This is the strongest proposition and is well established within Derry & Strabane's current tourism profile. Key opportunities include investment in animation and collaboration to offer a more coherent experience.

Creativity & Culture

Capitalising on our vibrant arts scene in the City and District. Visitors can encounter this through a year round calendar of festivals and events which incorporate music, theatre, language and literature with international appeal.

The award-winning food and drink scene can be explored all year round and this cultural hub is supported by a population who place a great value on creativity in all its guises.

This proposition is also well developed, but further co-ordination across public and private sector will help to establish the city and region as the cultural destination of choice on the island of Ireland.

Activity & Adventure

Developing our natural assets to make them accessible to visitors, allowing them to take time to enjoy and engage with visitors.

The broad range of activities includes; angling, kayaking, sailing, walking, cycling and sports. This incorporates the loughs, the rivers and the countryside both in the city and rural hinterland, most notably the outstanding Sperrin Mountains.

This proposition is the least developed in terms of product and capacity, but has significant potential to attract a new profile of visitors in the medium to longer term.

Key goals and programmes

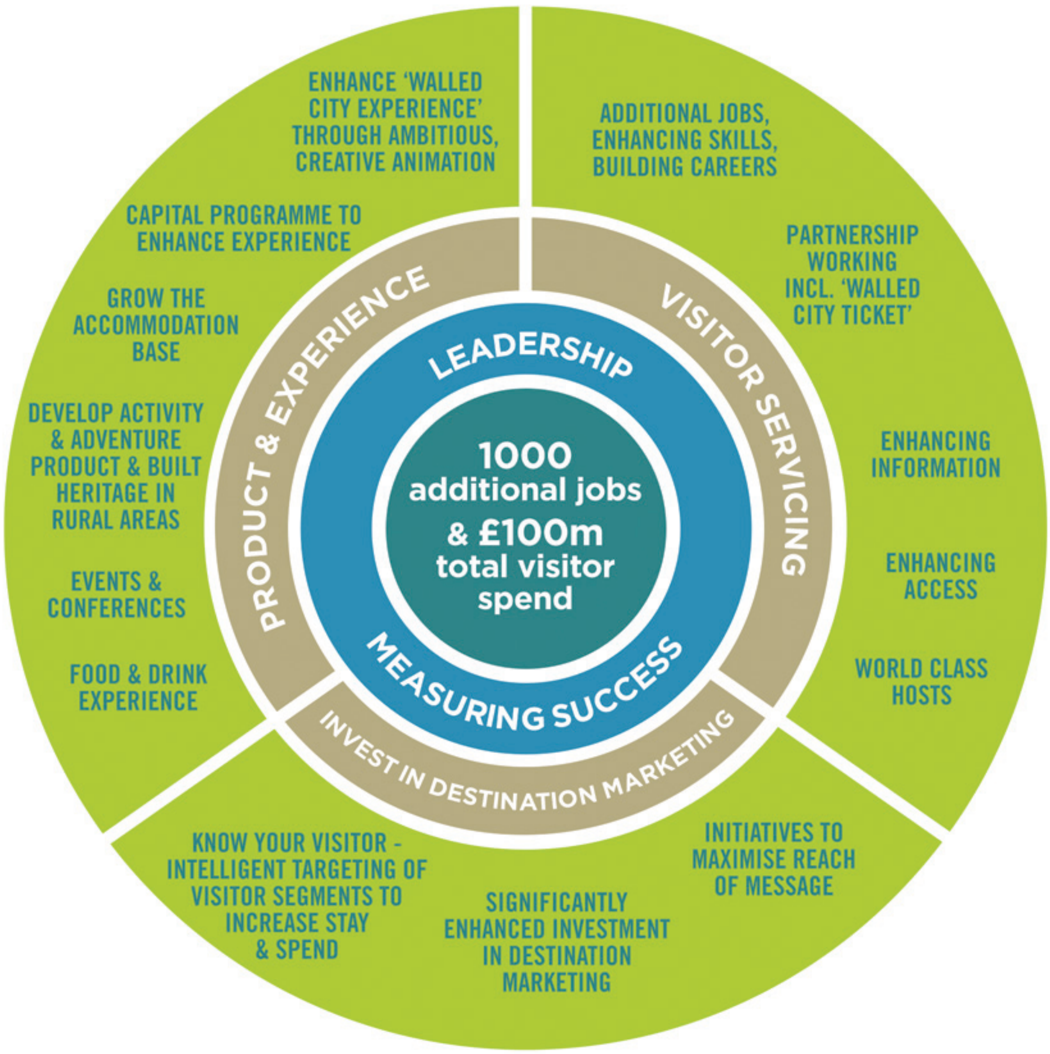
At the heart of this strategy the goal is to create and support jobs; these new jobs are created through increased visitor spend.

In 2015, 4685 jobs were supported by tourism. Over the period of the strategy an extra **1000 jobs** will be supported by tourism. In 2016 visitor spend in the council area was £50m. Over the period of the strategy this will **double to £100m**.

Delivering this strategy to such a widespread industry will require strong leadership, supported by timely, accurate and insightful data which will help to steer the future of tourism in the area over the next 8 years.

The action plan has been developed under three key themes;

- **Product & experience**
- **Visitor servicing**
- **Investing in destination marketing**



Delivering the strategy

In terms of governance a Tourism Delivery Partnership will be established with representation from key stakeholders and the private sector to oversee the delivery within the wider context of the Strategic Growth Plan.

The Tourism Delivery Partnership

The Tourism Delivery Partnership will:

- **Oversee the implementation of the Strategy and Action Plan**
- **Monitor and evaluate progress quarterly**
- **Evaluate any changes or alterations needed to respond properly to market conditions and circumstances as the Strategy progresses**
- **Liaise with other sub-groups and other named stakeholders involved with delivery of specific actions**
- **Commission an independent mid-term evaluation of the strategy in 2021**

Measuring success

Outcome: In the Strategic Growth Plan, tourism, alongside arts and culture, is to deliver the following outcome: **“We live in the cultural destination of choice”** ...offering **“world class visitor experiences”**.

Headline goals: At the heart of the tourism strategy are two overarching goals: Jobs and Visitor Spend

		METHOD OF MEASUREMENT	WHO CAPTURES	BASELINE	TIMING	2025 TARGET FOR DCSDC TOURISM
JOBS	The 2016 draft Industrial Strategy for Northern Ireland spoke of tourism leading to the creation of regionally dispersed employment opportunities. The DCSDC Strategic Growth Plan has an overall target of additional 15,000 jobs by 2030	Census of employment	NISRA	4685 PT or FT jobs in 2015	Every 2 years. Next in 2017	1000 additional jobs
		Input – Output approach based on additional Out of State expenditure	NISRA, DfE, economists		Annual - following production of visitor spend data at Council level	
VISITOR SPEND	The Northern Ireland aim of doubling external revenue to £1bn by 2025 was articulated within the 2016 draft Northern Ireland Industrial Strategy	Regional data	NISRA	£50.2m £36.5m from external visitors, £13.7m from domestic visitors	Annually	£100m visitor spend overall

Cross-cutting enabling indicators

Five cross-cutting enabling indicators have been identified as priorities for the strategy. These are listed below.

	RATIONALE	METHOD OF MEASUREMENT	LEAD	BASELINE	TIMING
1. VISITOR EXPERIENCE	Understanding and continuous improvement of the visitor experience is central to a strong visitor economy	a. Local research • Origin / Reason for visit / Length of stay / Tour or FIT etc. / accommodation • Quality of experience / What can be improved b. Visitor data from new ticketing / audience development system and through the use of digital technology c. Event / festival specific evaluation data	DCSDC, VD, TNI, Operators NISRA to QA approach	Origin from NISRA (2016) qualitative from VAS (2014)	Annual
2. ACCOMMODATION	Driving scale and occupancy to embed the area as a hub for exploring Ireland's North West, the WAW and the CCR. The Strategic Growth Plan includes hotel development within its 5, 10 and 15 year horizons	a. Rooms sold & occupancy rate	VD	67% hotel occupancy rate in 2016	Quarterly
		b. B&B / Self-catering NISRA annual LGD statistics	VD	B&B: 29% Self-catering: 33% (NISRA 2016)	Annual
		c. Monitoring of new developments / additional accommodation	DCSDC, VD, INI	4 hotels in pipeline c. 300 rooms	Annual
3. PEOPLE & SKILLS	Develop the skills needed for the industry to compete in a dynamic, internationally connected world	a. Retention & sustaining of World Host Designation	Tourism sub-group to the Education & Skills Group	Previously awarded 2014	Annual
		b. Focus on development of key capabilities: • Digital - ability to book & pay online • % of workforce qualified at level 2 & above • Decrease in % of employers reporting hard to fill vacancies	Tourism sub-group to the Education & Skills Group	Urban accommodation 72% Rural accommodation 75%	Annual
4. INVEST IN MARKETING	Grow investment in marketing to 2013 City of Culture levels by 2020	Monitor investment from public (e.g. DCSDC, TNI, TI, INI) & private (e.g. VD members) sources	Tourism Delivery Partnership	£250,000	Annual
5. CAPITAL PROGRAMME	Key capital projects listed in Strategic Growth Plan / highlighted in tourism strategy including: a. Walled City Lighting Phase 2 b. Maritime & Archive Museum c. Scoping an iconic visitor attraction d. Signage reflecting the hub location for exploring the WAW & CCR e. Relocation of Visitor Information Centre f. Wet weather family attraction at Templemore	Monitor progress against key capital investments Include a focus on levels of private investment	DCSDC	Estimated completion dates; a. 2019 b. 2019 c. 2018 d. 2018 e. 2018 - 2019 f. 2020	Quarterly

Product and Experience

PE1 Capital programme to enhance visitor experience in the Walled City

New and enhanced visitor experiences aligned to destination brand

PE#	ACTION	OWNER	STAKEHOLDERS	TIMEFRAME	ESTIMATED COSTS
1.1	Develop the Maritime Museum & Archive at Ebrington	DCSDC	TNI, HLF, DfC, TEO	2019	£11.2m
1.2	Scope potential for a major new tourism attraction, potentially including visual arts / regional gallery	DCSDC	NMNI, ACNI, TNI National Trust HED	Scoping work to be completed by 2018	£50k
1.3	Expand & develop Phase 2 of the Walled City Lighting Strategy to encompass new attractions	DCSDC	TNI, DfC Inner City Trust	2019	£2m
1.4	Ensure physical regeneration plans (inc. Local Development Plan) support preservation and utilisation of built heritage and enhance the brand. Build on existing good practice in the city. A. Prepare and deliver a conservation-led place-making framework for City Centre which promotes positive regeneration and investment opportunities (encompassing the Walled City Conservation Area), and of a standard commensurate with similar international best practice heritage locations B. Promote city centre living within the City Centre as part of regeneration schemes like Townscape Heritage Initiative and other related programmes. Implement new gateway and arterial route signage strategy by 2019 (see Action VS4.2) including new focus on Walled City where the Wild Atlantic Way meets the Causeway Coastal Route. Promote sustainable modes of transport which have the objective of maximising use of public transport and other environmentally friendly modes of transport which contributes to reducing congestion and car parking demand. Continue to promote the removal of external shutters through: 1. regeneration schemes such as Townscape Heritage Initiative, Revitalisation (shopfront enhancement) and other related initiatives; 2. Enhanced planning policies which actively seek to discourage external shutters and promote other aesthetically secure design alternatives Promote and deliver initiatives that seek to address under-utilised properties within the City Centre and encourage sustainable and meanwhile uses conducive with a historic City Centre environment C. Implement plan for more substantial long term tenancy of city centre heritage buildings.	DCSDC, HED	Multi-sector heritage stakeholders	A. 2017 - 2018 B. 2018 - 2020 C. 2020 on	£50k for plan Plan will cost actions
1.5	Commission public art to signify the City's geographical and cultural connection between the WAW and CCR	DCSDC	DCSDC, VD, ACNI	2018	TBC
1.6	Develop a regionally significant family-friendly wet weather attraction at Templemore as part of Council's new leisure estate	DCSDC	DfC, DfE	Under construction by 2020	£40m
1.7	Relocation of the Visitor Information Centre to Waterloo Place. Utilise the relocation of Visit Derry to provide high quality digital visitor services	DCSDC	TNI, VD, DfC	2018 - 2019	£1m
1.8	Secure external funding to deliver a third phase of Townscape Heritage (TH) initiative funding to implement a heritage-led property regeneration scheme within the Walled City Conservation area (Upper Carlisle Road & Cathedral Quarter) to restore key heritage buildings and maximise their uses	DCSDC / Walled City Partnership	DfC NWDO / DFC HED / NIHE / HLF / Private Sector	2019 - 2021	TBC
1.9	Promote the phased development and regeneration of the Council-owned Boom Hall Estate, working in conjunction with relevant stakeholders, as a key heritage asset & attraction which will benefit visitors and citizens alike	DCSDC	Community Stakeholders / DfC / TNI / Private Sector	2025	TBC
1.10	Develop a capital project focusing on the journey towards peace	Gasyard Development Trust	Community Stakeholders	2019-2020	£800K Capital Costs

PE2 Create the Walled City experience with ambitious, curated animation

Working with theatres, actors, visual artists etc. to tell the stories in engaging, entertaining ways in key visitor spaces in the city and rural area.

PE#	ACTION	OWNER	STAKEHOLDERS	TIMEFRAME	ESTIMATED COSTS
2.1	Develop the Walls as a world class cultural attraction – bring the walls and surrounding attractions to life through a sustained programme of animation and arts and cultural performance, recognising in particular 400 years since the completion of the Walls Scope funding opportunities to support delivery.	DCSDC	DWMG, TNI	2018 - 2020	£500k
2.2	Work with the local community, creative and cultural sector to develop programme content and support event delivery to enhance the visitor's experience, including a focus on the evening economy, in key visitor spaces in the city and rural areas.	DCSDC	ACNI, Creative & Cultural sector, TNI	2018 - 2020	£25k per year (£75k total)
2.3	Recruit a Peace Tourism Officer and work closely with communities to implement an action plan which will be supported by existing community tourism strategies with the aim of growing living, a modern history experience, sharing the City's unique experience (including education / learning from the last 400 years and the last 40 years – Troubles, peace and reconciliation) with the potential to engage across communities.	DCSDC	Community stakeholders, TNI, VD	2018 - 2020	£318,805 (EU Peace Funding)

PE3 Grow the accommodation base

A critical element of the area becoming a hub for exploring WAW, CCR and Ireland's North West

PE#	ACTION	OWNER	STAKEHOLDERS	TIMEFRAME	ESTIMATED COSTS
3.1	Ensure good information on the scale, quality and variety of existing accommodation, market demand for accommodation, description of how new hotels would be supported (e.g. in relation to sourcing skilled staff), description of local context (e.g. dealing with currency exchange rates) is collected and available to support and influence future investment / decision making.	TNI, INI	DCSDC, VD Investors, NISRA, People First, NIHF	Ongoing	N/A
3.2	Work closely with in house planning to identify areas of opportunities, strategic importance of additional accommodation and are supportive in terms of efficient, timely decisions.	DCSDC	TNI, VD	Ongoing	N/A
3.3	Undertake an assessment of need and provide follow up support as required regarding: • Identify tourism opportunity areas, areas of constraint / protection and also new Planning Policies which are appropriate to deliver the Council's tourism objectives. • Additional accommodation options for niche product e.g. angling, walking, innovative rural product etc • Additional capacity building required to help deliver and sustain such accommodation (e.g. from online booking, use of social media, business planning etc.)	DCSDC	TNI, VD	2018	£15k for detailed assessment

PE4 Develop the activity & adventure product across the region & rural built heritage

Support the establishment of quality product and clustering appropriately.

PE#	ACTION	OWNER	STAKEHOLDERS	TIMEFRAME	ESTIMATED COSTS
4.1	Develop the Riverine Project including a new district/regional park facility for the towns of Strabane, Lifford and surrounding hinterlands to include a community building, café, parkland, pedestrian bridge, enhanced river access and outdoor event space	DCSDC / DCC	SEUPB, Local Community Stakeholders (Community, Sporting Organisations)	2018 - 2021	€8.5m
4.2	Support the Future Search process for Sperrin's Area of Outstanding Natural Beauty & wider area to develop plan & actions regarding preservation, destination development etc.	DCSDC, F&ODC, CC&GBC, Mid-Ulster,	Government & Statutory Agencies: Community / Voluntary & Charitable Organisations Private Sector	2017 - 2018	£10k
4.3	Implement active travel projects including cycling and walking trails and promote those of most relevance to visitors	D&S Active & Sustainable Travel Forum	DCSDC, VD, PHA, TNI, WHSCT, Private sector, community	Ongoing	£12k annually
4.4	Support the implementation of the NW Greenways Plan which sets out a strategic vision for cross-border greenway development in the region including the 46.5km of new cross-border greenway across three routes: Derry-Buncrana, Derry-Muff and Lifford-Strabane	DCSDC	DCC, Sustrans, Transport NI	To be implemented by 2022	€18.5m needed for 3 named routes (€14.8m secured via Interreg)
4.5	Support the development & promotion of the Ulster Ireland International Appalachian Trail (long distance walking trail)	Stakeholder Councils, DLDC, UI-IAT steering group	NIEA / ORNI/ UFRC / FI / ROI's Department of Foreign Affairs & Trade / TI / TNI / Derry-Strabane Local Action Group / VD / Private sector	Ongoing RDP Co-op Project: To be implemented by 2020	Approx. £800K for key priority actions identified within 2017 scoping study (Investment to cover entire Ulster Ireland route incl. DCSDC Route Priorities)
4.6	Review opportunities & assess feasibility options in water based tourism product & infrastructure development Promotion of water based tourism products including angling, canoeing, kayaking, sailing, white water rafting etc.	LA	DAERA (Inland Fisheries), DCSDC, Angling NI, Canoe Assoc. NI, TNI, VD	Ongoing	Annually
4.7	Scope options & develop action plans for rural built heritage, articulating opportunities for short-term incremental investments & longer term vision (e.g. Ashbrook, Sion Mills, Eglinton, Prehen)	DCSDC	HLF, Local Preservation Trusts & Partnerships	2018 - 2019	10k per plan
4.8	Develop a 3 year programme to support capacity building relating to rural tourism opportunities (using the SAINT project as a model for this) including Strabane as a focal point for information & accessing activity & adventure	TNI, DCSDC, NWRC	People 1st, ORNI, DAERA, NWRC	2018 - 2020	£150k (approx. £50k per year)
4.9	Develop the City as a hub for accessing World Class Golf courses & a base for major competitions (The Open 2019)	VD	DCSDC, DCC, TNI	2018	N/A
4.10	Develop screen tourism product within the region & establish a hub for exploring locations such as 'Derry Girls', 'Game of Thrones' and 'Star Wars'	DCSDC, VD	TNI, DCC	2018	N/A

PE5 Events, conferences and incentive travel

Building on the area's events reputation and developing a conference offering

PE#	ACTION	OWNER	STAKEHOLDERS	TIMEFRAME	ESTIMATED COSTS
EVENTS					
5.1	Develop festival & events strategy to maintain & develop the existing programme, develop capacity & capability, secure events of international appeal and develop signature events around key themes such as the 400th anniversary of the city walls. Include consideration of: • Scope of events (e.g. music, art, sport, heritage, maritime) that will appeal to key visitor markets • Attract events for national/international audiences • Link festival programme to the Walls to better connect all citizens with the single largest tourism asset. Include a focus on sponsorship / media /PR & press • Need for continuous development of capacity & product • Support & enhance the evening economy / experience • Active planning to address key gaps in events calendar and seasonality • Consider how festivals can grow & profile Strabane and emerging rural product (e.g. angling & walking festivals) • Governance to ensure close collaborative working • A target on quality & timely communication with industry • Linking with events across the region for marketing purpose	DCSDC	TNI, VD, TI	2018	£30k £900k annually £200k sponsorship annually
CONFERENCES / INCENTIVE TRAVEL					
5.2	Increase the focus on building the city as a premier location for small/medium sized conferences. Consider actions on: • Venues & accommodation (to clarify scale, variety, potential capital improvements, shared pricing strategy etc.) • Further development of ambassador programme through research & recruitment • Timing to help counter seasonality	VD	DCSDC, Ambassadors, Venues, Hoteliers, University, WHSCT, Invest NI	2018	£80k to cover research (£50k) & human resource (£30k)
5.3	Develop and promote a small number of high quality experiential itineraries for incentive travel in the area. Monitor, review & develop further itineraries if needed	VD	DCSDC, TNI, Industry	2018	N/A

PE6 The food and drink experience

Work closely with food and drink sector and related business to continue raising the standards in terms of visitor experience.

PE#	ACTION	OWNER	STAKEHOLDERS	TIMEFRAME	ESTIMATED COSTS
6.1	Develop and implement Food and Drink Strategy & Action Plan to further develop the region as a leading food destination	DCSDC	Food NI, NIFDA, NWRC, FoodOvation, DAERA, TNI, Invest NI	Strategy to 2025 Action Plan to 2020	£15k for development
6.2	Establish Strategic Food Group to identify opportunities, tackle challenges and drive actions identified in Food Action Plan	DCSDC	DCSDC, Food NI, NIFDA, NWRC, FoodOvation, DAERA, Invest NI	2018 Meet quarterly	N/A

VS1 Increasing employment (target of 1000 extra jobs), enhancing skills and building careers

Attracting more visitors who are expecting ever improving experiences will mean increased employment and an increased focus on quality and quantity of the skills among the people serving them.

VS#	ACTION	OWNER	STAKEHOLDERS	TIMEFRAME	ESTIMATED COSTS
1.1	Integrate with skills actions in the Strategic Growth Plan (and with other relevant plans e.g. Food & Drink Strategy) A tourism sub-group has been established as a sub group of the Transitional Employment and Skills Delivery Group (Strategic Growth Plan)	Tourism skills subgroup	DCSDC, TNI, NWRC, UU, DfE, DfC, VD, Employers, Industry, Invest NI, People First	2018	Resource to drive the Tourism Skills Group & actions
	A. Sub-group will utilise available data/research on skills & commission ad hoc local research. Take account of the NI Tourism Skills Action Plan & align activity appropriately. Monitor/research key local skill shortages related to tourism e.g. digital competency, languages, tour guides, selling, chefs, apprenticeships.	Tourism skills subgroup	DCSDC, TNI, NWRC, UU, DfE, DfC, VD, Employers, Industry, Invest NI, People First	Ongoing	£30k research budget
	B. Sub-group to scope, plan and/or deliver a menu of interventions and map current provision aligned to sector need in the region: • Up skilling/Reskilling & Pathways • Up skilling those in the sector so they can progress within the industry • Reskilling those outside the sector to work in tourism • Business development support – building management and leadership capabilities within the sector • Embed entrepreneurism – promote business and self-employment opportunities related to tourism. Link to wider support programmes	Tourism skills subgroup	DCSDC, TNI, NWRC, UU, DfE, DfC, VD, Employers, Industry, Invest NI, People First	Ongoing	Funding from ESF, DfE, DfC
	C. Sub-group to facilitate increased industry engagement in the area of careers advice and guidance to grow the reputation of the sector as a career or choice:	Tourism skills subgroup	DCSDC, TNI, NWRC, UU, DfE, DfC, VD, Employers, Industry, Invest NI, People First	2018	£10k annual promotional budget

VS2 World class hosts

Help ensure those working with visitors deliver world class service. Frequently visitor experiences are delivered locally by people who most probably will not even know that a “tourism strategy” exists.

VS#	ACTION	OWNER	STAKEHOLDERS	TIMEFRAME	ESTIMATED COSTS
2.1	Retain and sustain World Host Destination designation through refresher training	DCSDC	VD, People First, NWRC, TNI, DE	2018 & annual refresh	£20k (£170pp if not funded)
2.2	Fund, recruit and train additional tourism ambassadors, increase the duration of their working period and develop the menu of ways in which the ambassadors can welcome, provide information, tell stories, engage visitors and collect data	VD	DCSDC, Industry	2019	£30k for an additional 8 ambassadors
2.3	Assess potential for licensing tour guides who take tours on the Walls	HED, DCSDC	Tour guide operators, VD	2018	N/A
2.4	Use the launch of the tourism strategy (launch event, online / offline media coverage, stakeholder engagement) to work with local communities to raise local awareness and civic pride in tourism products and experiences among the general public – encouraging a warm local welcome to visitors	DCSDC	VD, TNI	2018	N/A

VS3 Partnership working

The message is simple. A collaborative approach will be a stronger approach for the sector and a better experience for the visitor.

VS#	ACTION	OWNER	STAKEHOLDERS	TIMEFRAME	ESTIMATED COSTS
3.1	Scope and develop a single integrated ticket for the city – 'Walled City ticket'. The steps for this should include: • Engage 3rd party to facilitate process • Identify potential participants & appoint a working group to lead • Explore potential options (including best practice in comparator cities) considering pricing; ticketing; marketing; training; governance etc. • Pilot, review and implement • Promote and sell	DCSDC, VD	Participant attractions, TNI	2020	£20k for independent facilitation £100k capital cost for integrated software Annual licensing cost
3.2	Facilitate enhanced levels of local collaboration. For example: • Hold thematic meet-ups 'history & heritage', 'creativity & culture' and 'activity & adventure' • Encourage & set targets for clustering / cross promotion / cross selling initiatives • Online platform for tourism industry business to network, share ideas and successful practices & inform the sector	DCSDC, VD	Industry, NWRC, UU, TNI	Ongoing	N/A
3.3	Use the strategy's key messages to communicate, educate businesses & get buy-in across industry & government partners.	DCSDC	VD, Industry	2018	N/A
3.4	Facilitate enhanced levels of collaboration between Council and Visit Derry: • Recruitment of a shared resource to support with destination brand management & external PR • Embed closer working models between Council, Visit Derry and TNI	VD, DCSDC	TNI	2018	£80k annually

VS4 Enhancing information

If the City is to be a hub it needs to have great information provision to make it easy for visitors wanting to explore the wider region.

VS#	ACTION	OWNER	STAKEHOLDERS	TIMEFRAME	ESTIMATED COSTS
4.1	Develop and implement signage strategy: • Making clear the Walled City is the link between WAW & CCR, and hub for exploring the NW region • Enhance signage and orientation – multi lingual provision, apps & trails, walkways, tours & cycle	DCSDC	Transport NI, VD, TNI, DCC, Failte Ireland	2019	£250k
4.2	Assess the need for and support implementation of new / additional mobile & digital information points, reducing the reliance on printed media	VD	DCSDC, TNI	2018	£5k per unit

VS5 Enhancing access

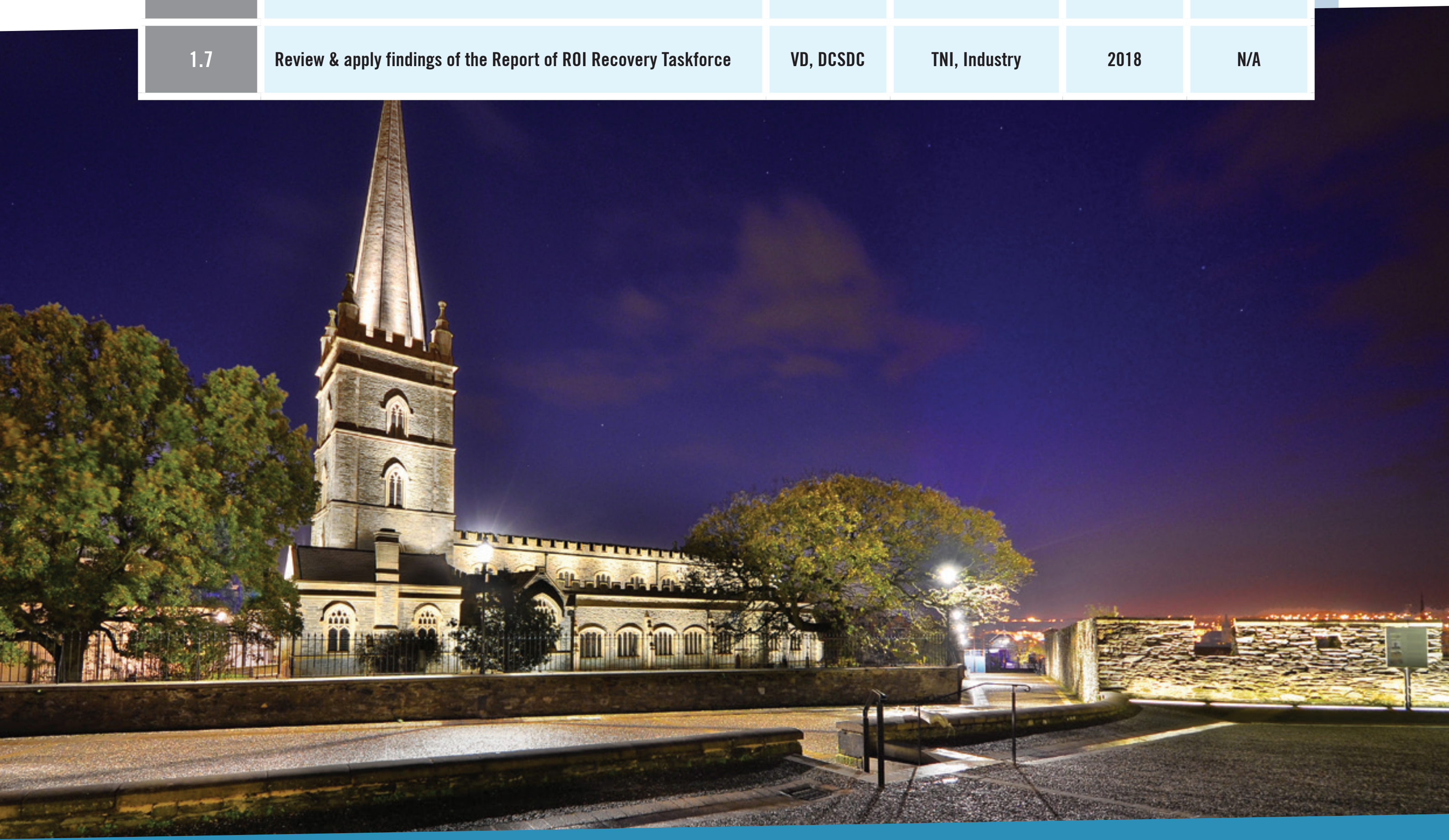
If the City is to be a hub it needs to have great transport links to make it easy for visitors wanting to explore the wider region.

VS#	ACTION	OWNER	STAKEHOLDERS	TIMEFRAME	ESTIMATED COSTS
ACCESS TO THE AREA					
5.1	Improve road network (A5 and A6) and network connecting to Wild Atlantic Way and Causeway Coastal Route to help facilitate position as a hub for both	DfI	DCSDC	A5: Phase 1 (2018 - 2019); Phase 2 (2021 - 2023) A6: 2018 - 2021	TBC
5.2	Improve access by rail and bus: relocate station to become a transport hub with expanded routes and timetables	DfI	Translink, DCSDC	Complete by 2020	£26m
5.3	Improve access by air: pursue expansion of air routes to Great Britain and Europe based on market segmentation with view to increase passenger numbers, link more with regional airports	TNI, TI	DfE, DCSDC, INI, Airports (City of Derry, Belfast Intl, Belfast City, Dublin)	Ongoing	TBC
5.4	Feasibility study into development of cruise ship infrastructure	DCSDC, DCC	Foyle Port, VD, Loughs Agency	2018	€50k - €100k
ACCESS WITHIN THE AREA					
5.5	Undertake business case to assess options and cost for: • Visitor infrastructure to improve accessibility – particularly coach parking and drop-off, camper van parking, general parking and facilities • Improving toilet/shower facilities at a number of key locations across the council (including marinas)	Transport NI, DCSDC	Coach operators, Translink, VD	Business case by 2019	£50k for business case
5.6	Improve access to the rural hinterland – particularly the Sperrins. Link with neighbouring Councils & Future Search process	Derry-Strabane Active & Sustainable Travel Forum	NW Taxi Association, Translink	Ongoing	TBC
5.7	Support extended opening times at attractions (link with PE Action 2.3) – including morning, evening and Sundays.	Venue operators	DCSDC, VD, Tour Operators, TNI, TI	2018	N/A

DM1 Know Your Visitor (and the businesses/operators who bring them)

Intelligent targeting of visitor segments to increase visits, stay and spend

DM#	ACTION	OWNER	STAKEHOLDERS	TIMEFRAME	ESTIMATED COSTS
1.1	Establish a group / mechanism to analyse existing data, focussed on understanding visitor 'motivators' for coming to Derry & Strabane, and experiences when there. Communicate findings with local stakeholders responsible for delivery of visitor experience, servicing, marketing, selling to operators / businesses, etc.	VD, DCSDC	NISRA, TNI, TI, Industry	2018	N/A
1.2	Group / mechanism should use visitor insight annually to confirm / refresh target communications with 'best prospect' segments in 'best prospect' markets.	VD, DCSDC	TNI, TI, Industry	Annual	N/A
1.3	Undertake regular market research on the visitor experience to DCSDC (e.g. The Walled City experience and supporting strands: History and Heritage, Creativity and Culture, Activity and Adventure, on City as a hub for WAW/CCR /North West, and capture of attraction and accommodation specific data.	DCSDC	VD, TNI, TI	Annual	£30k annually
1.4	Capture and communicate visitor data from new ticketing system / audience development programme and through the use of digital technology	DCSDC	VD, TNI	Annual	N/A
1.5	Link into Tourism Ireland / Tourism NI efforts to scope and develop an approach to data analytics which will improve understanding of current and potential visitors (e.g. monitoring enquiries and pre-arrival data, tracking tool to monitor user generated content, expenditure tracking etc).	TNI, TI	DCSDC, VD	Ongoing	N/A
1.6	Liaise with NISRA in order to highlight the need to record robust day trip visitor numbers at the council level.	DCSDC	NISRA, VD, TNI	2018	N/A
1.7	Review & apply findings of the Report of ROI Recovery Taskforce	VD, DCSDC	TNI, Industry	2018	N/A



DM2 Invest in marketing: The Walled City – Where the Wild Atlantic Way meets the Causeway Coastal Route. A destination and a perfect hub for exploring.

Significant uplift in marketing investment required to develop and apply 'coherent, compelling and complementary' marketing and messaging content.

DM#	ACTION	OWNER	STAKEHOLDERS	TIMEFRAME	ESTIMATED COSTS
ACCESS TO THE AREA					
2.1	Collaborate to further develop brand: • Cross-agency working group established; • Use evidence and analysis from tourism strategy • Invest in development of a brand toolkit; • Ensure coherence and consistency across Council, VD and stakeholders	DCSDC, VD	Invest NI, TNI, TI, Industry	2018 A5: Phase 1 (2018); Phase 2 (2021 - 2023) A6: 2017 - 2021	£10k for support with developing brand toolkit
2.2	Invest in suite of marketing collateral (online and offline) aligned to: Walled City: Meeting point between WAW and CCR Walled City: History and Heritage destination experience; Walled City: Creativity and Culture destination experience; Walled City as Hub: Reinforce the message of the area as a hub for exploring (WAW, CCR, Ireland's North West, golf, screen etc.) Activity and adventure: Grow investment in marketing / development of marketing content over time as product and experiences develop	VD	DCSDC, TNI, TI, Industry, Creative Sector,	Annual	Grow investment in marketing to 2013 City of Culture levels by 2020 (i.e. approx. £2m)
2.3	Work collaboratively to ensure alignment with TNI's marketing proposition of scale and other island wide creative branding and to maximise potential for joint campaigns.	VD	TNI / TI, DCSDC	Ongoing	N/A
2.4	Implement multi-channel marketing strategy including: • Route to market plan - engaging with tourism influencers/international travel writers and bloggers, developing familiarisation trips • Increased focus on digital and social media • Clear roles for stakeholders • Role for / investment in local creative sector e.g. producing specific marketing projects • An enhanced budget (benchmark with marketing spend of comparator destinations and 2013 City of Culture)	VD	DCSDC, TNI, TI, Industry	2018	Grow investment in marketing to 2013 City of Culture levels by 2020 (i.e. approx. £2m)
2.5	Investment in cruise tourism growth plan: industry engagement, cruise call support, promotional material, memberships/ affiliations	VD	DCSDC, Foyle Port, DCC	LA	£55k

DM3 Initiatives to maximise reach of message

Initiatives to support the marketing

DM#	ACTION	OWNER	STAKEHOLDERS	TIMEFRAME	ESTIMATED COSTS
3.1	Maximise reach of message (1) Secure international designations	DCSDC	VD, ACNI, NMNI, UU, NWRC	2018 & ongoing	TBC
3.2	Maximise reach of message (2) build and maintain a vibrant global diaspora community, connected to Derry & Strabane. Proactively target Derry & Strabane diaspora through development of e-zine, online platform, diaspora events programme and establishment of diaspora working group. (IES)	DCSDC	Invest NI, NI Connections, Derry & Strabane Diaspora, UU, NWRC	Annual Programme	£20k Annual programme
3.3	Build on our existing international relationships including Sister Cities and international partners to showcase the City region internationally and partner with stakeholders to promote the city internationally around major events and international relations work programme.	DCSDC	TI, UU, NWRC, VD	Annual Programme	£20k Annual programme

Glossary

ACNI	Arts Council Northern Ireland
CANI	Canoe Association Northern Ireland
CCAG	Causeway Coast and Glens Borough Council
CCI	City Centre Initiative
CCR	Causeway Coastal Route
DAERA	Department of Agriculture, Environment and Rural Affairs
DCC	Donegal County Council
DCSDC	Derry City & Strabane District Council
DfC	Department for Communities
DfE	Department for Economy
DfI	Department for Infrastructure
DLDC	Donegal Local Development Company
DWMG	Derry Walls Management Group
ESF	European Social Fund
F&ODC	Fermanagh and Omagh District Council
FI	Fáilte Ireland
FIT	Frequent Independent Traveller
GVA	Gross Value Added
HED	Historic Environment Division (Part of Department for Communities)
HLF	Heritage Lottery Fund
INI	Invest Northern Ireland
LGD	Local Government District
NIEA	Northern Ireland Environment Agency
NIFDA	Northern Ireland Food and Drink Association
NIHF	Northern Ireland Hotels Federation
NIHE	Northern Ireland Housing Executive
NISRA	Northern Ireland Statistics & Research Agency
NMNI	National Museums Northern Ireland
NWDO	North West Development Office
NWRC	North West Regional College
ORNI	Outdoor Recreation Northern Ireland
PHA	Public Health Agency
QA	Question Answer
SEUPB	Special European Union Programmes Body
SME	Small Medium Enterprise
TEO	The Executive Office
TI	Tourism Ireland
TNI	Tourism Northern Ireland
UI-IAT	Ulster Ireland International Appalachian Trail
UU	Ulster University
URFC	Ulster Federation of Rambling Clubs
VAS	Visitor Attitude Survey
VD	Visit Derry
WAW	Wild Atlantic Way
WHSCT	Western Health & Social Care Trust