



Comhairle Cathrach na Gaillimhe
Galway City Council



Comhairle Chontae na Gaillimhe
Galway County Council

**HAVE
YOUR
SAY!**

GALWAY *to 2025*

Preparing a Tourism Strategy for Galway

GALWAY'S AWARDS



European Capital
of Culture 2020



European Region
of Gastronomy 2018



European
Green Leaf 2017



UNESCO
City of Film



Great Town
Award 2013



fDi Micro City
2014



Friendliest City
in the World



Purple Flag
Award 2015

Galway is...

...the **cultural heart** of Ireland with **boundless energy** and **excitement** in the **City of the Tribes** and **gateway to the west**.

Lying at the **edge of the Atlantic Ocean** and **Wild Atlantic Way**, it is a region encompassing the **warmest of welcomes** for our **Diaspora** and new friends....and offers **gastronomical delights....**

It is **young at heart**, fostering **learning** and expression through its **vibrant festivals, music, film** and authentic **bi-lingual way of life....**

Galway is full of beautiful **natural landscapes** with **majestic mountains**, lakes, rivers and a **vast seascape**it offers unrivalled city, town, village and rural experiences

What do you think about Tourism in Galway?

Galway County Council and Galway City Council would like to know your thoughts on tourism in Galway.

This document sets out some of the key facts and main issues facing tourism. It sets out a proposed vision, aims and action areas for a new strategy, considering current strengths, weaknesses and opportunities.

A number of questions are set out below for your consideration. Please send your comments to tourism@galwaycoco.ie by 16th December, 2016.

Questions

-
- Q1** What should a tourism strategy achieve?
How could this be delivered?
-
- Q2** Are the issues listed relevant?
If not, what's missing?
-
- Q3** Who should we talk to?
-
- Q4** Are the vision and aims right?
If not, what could they be?
-
- Q5** How should Galway be marketed or branded?
-
- Q6** How can community concerns about tourism be addressed? How can communities be supported to get involved?
-
- Q7** How can the environment which attracts so many to Galway be protected?
-
- Q8** What facilities are needed for tourism?
-
- Q9** Is there anything else you would like to add?
-

1.0 Some Facts about Tourism in Galway....

Globally, tourism continues to grow but it is an *uber competitive* industry with demanding customers. According to Fáilte Ireland¹, almost 2.25 million visited Galway in 2015, spending close to €670 million. In 2015, it attracted 11% of total overseas visitors (third highest after Dublin and Cork) who generated €475 million in revenue. 9.8% of total domestic visitors came to Galway in the same year and generated €194 million. It is estimated that 12-14% of Galway businesses are involved in tourism and it accounts for 10-12% of employment².

Galway is a place that people want to live, work and visit. It is brimming with personality and embraces visitors with a warm welcome. As Fáilte Ireland research shows, visitors continue to express their delight with 'our people' and 'our place'.

As a cultural and festival capital, tourists to Galway can enjoy an array of experiences from the urban to the rural including the vibrant *City of the Tribes* and breath-taking landscape, to its people and culture and an emerging food movement.

A range of accolades have been bestowed on Galway for culture, creativity and film, food, enterprise, sustainability, a vibrant night-time economy and friendliness with many more awards being sought including the celebration of our young people.

The national tourism strategy³ places an emphasis on attracting overseas visitors to Ireland as there is greater potential for numbers to increase. Domestic tourism has limited growth potential but remains important to the west of Ireland.

In 2015, Galway City Museum attracted 174,556 visitors and Connemara National Park recorded 190,753 visits (both free attractions). Of the fee-

paying attractions, 105,000 visited The Sheep and Wool Centre with 120,104 travelling to Dún Aonghasa on the edge of Inis Mór⁴ and 300,000 visiting Kylemore Abbey and Garden.

Visitors come to the west for leisure breaks, to see family and friends or for business purposes. Some are day trippers - who are bound to a schedule (e.g. coach/ cruise tour programme) and others are independent travellers who are not restricted by a time schedule. The latter are more likely to immerse themselves in all Galway has to offer.

Most overseas tourists to Galway come from the United States, Germany, France and Great Britain and include Irish *Diaspora*. Research carried out by Fáilte Ireland has identified different types of visitor. They want different things from a holiday and have different interests and characteristics.

Overseas visitor segments include the '*great escaper*' who are aged 30 and like to get away from it all and be revitalised; the '*culturally curious*' who are aged 40+, are independently minded, interested in history and culture and all a place has to offer; and the '*social energiser*' who are young and looking for excitement, sharing their adventure with friends in European Cities.

Domestic visitors include the '*connected families*', '*footloose socialisers*' and '*indulgent romantics*'.

Tourists' exhibit specific behaviours prior to, during and after their holiday. Firstly they consider where to visit and carry out price comparisons, they usually decide what to do when they arrive in Ireland and share their experiences (online and on social media). The discussion of the holiday experiences or generation of customer reviews is usually short lived when visitors return home.

¹ Fáilte Ireland (October, 2016) *Regional Tourism Performance in 2015*.

² Irish Tourist Industry Confederation (2015).

³ Department of Transport, Tourism and Sport (2015) *People Place and Policy – Growing Tourism to 2025*.

⁴ Fáilte Ireland (2015) *Visitor Attractions Survey 2015*.

Administrative boundaries are irrelevant to visitors as they are looking for great holiday 'destinations'. Galway's strong performing areas and established centres are Galway City, the Aran Islands and Connemara. They must continue to be supported with their deficits addressed over time.

As the more inland areas of County Galway cannot directly compete with coastal areas, the focus must be on the provision of alternative experiences with excellent visitor management and services, authenticity, less congestion and special interest breaks, etc.⁵ The east of the county offers opportunities of particular appeal to domestic visitors. A *Lakelands* brand will be developed to encompass the experiences of the midland counties and east Galway.



Almost 700km of Galway's coastline runs along the *Wild Atlantic Way* with Galway City and Clifden recognised as key hotspots and Salthill at the mid-way point. The *Wild Atlantic Way* route stretches for almost 2,500km from Donegal to Cork and the international brand is starting to get a foothold, attracting 3.8 million visitors⁶ in 2015 (35% are in the 'culturally curious' segment, 13% are 'social energisers' and 8% are 'great escapers'). However, only 12% of overseas visitors travel north of Galway, while the majority 61% travel south of Galway (Fáilte Ireland, 2016).

The necessary infrastructure and facilities must be put in place for tourists. A number of key projects and experiences (including festivals) which are exciting and memorable must elevate Galway's reputation as a tourist destination.

The Gathering demonstrated how communities invest in tourism and support it. Their tireless efforts in organising festivals and events and maintaining their local area or presenting their heritage are tremendous.

'Small towns' really do have 'big ideas' for the future of their area⁷. The tourism and hospitality sector deliver the goods and services which are vital to visitor enjoyment and offer service with a smile. They are the innovators who develop new tourism products and attractions.

Tourism requirements are multi-faceted and there is no dedicated funding, agency or body charged with delivering tourism products. While many organisations support tourism in Galway, they have different functions, responsibilities and priorities. They include the government Department of Transport, Tourism and Sport (responsible for a national strategy and action plan), Tourism Ireland (marketing Ireland internationally), Fáilte Ireland (involved in marketing and research, funding infrastructure and supporting businesses) and the Councils (who provide seed funding for festivals, lifeguard services, tourism facilities and infrastructure, litter management, environmental protection and promotion of cultural heritage among a range of other activities).

Others include Údarás Na Gaeltachta (responsible for the economic, social and cultural development of the Gaeltacht), representative organisations such as Chambers of Commerce, the Irish Tourist Industry Confederation, the Restaurants Association of Ireland, the Irish Hotels Federation, local development companies, Coillte (who provide recreational facilities), the Office of Public Works (who manage historic sites), the National Parks and Wildlife Service (who manage the national parks), the National Trails Office and many others. The education sector and national tourism agencies are involved in meeting sectoral skills needs and conducting research.

With so many involved, it is clear that an integrated approach to destination management is needed.

5 WDC (2000) *A Blueprint for Tourism in the West*.

6 This is a 9% increase visiting the Wild Atlantic Way from 2014 (Fáilte Ireland, 2015).

7 The Galway 2020 team organised consultation events on this theme for the European Capital of Culture bid.

2.0 Issues to consider....

There are a range of issues to consider – including how Galway will contribute to national tourism targets and how it can improve its performance in a sustainable and responsible manner by increasing revenue and visitor numbers.

There are thousands of holiday destinations worldwide so how do we tell the world about Galway and captivate people? Tourist destinations must stand out if they are to attract visitors.

Galway's message and what it is selling - must be clear and simple. It must also fit within the *Wild Atlantic Way* or *Lakelands* brand. Will it be exciting and memorable – iconic, symbolic, diplomatic or comic? Consistent marketing and branding will be needed (e.g. with a master brand, logos, symbols, a digital hub, public street dressing, etc.) and opportunities to learn from international good practice examples and regions of comparable size must be grasped.

Tourism is an incredibly competitive market, however it can also be heavily affected by global economic issues, political instability, conflict and natural disasters such as volcanic ash or disease outbreak. UK exit from the European Union and fluctuations in currency values may also have an impact on tourism in Galway. The tourism sector must also remain value for money if it is to compete internationally.

Despite their relative short stays, tourists are demanding and seek excellent products and joined up holiday experiences. An understanding of what the market wants should guide the offering provided (i.e. why tourists go out of their way to visit Galway). Ongoing refinement will be necessary taking account of any changes in market profile, demands, preferences and lengths of stay. As the capital of festivals, a small number of signature events must be elevated to have international appeal.

It is most important that visitors do not develop a feeling of 'indifference' towards Galway, as though it is akin to countless other destinations.

We want visitors to care about Galway and immerse themselves in the unique experiences, share their recommendations and attract repeat visits.

Tourism businesses and communities can benefit from capacity building, support and engagement. There are a range of supports already on offer, but are they aware of them or availing of them? Many tourism businesses are of a micro or medium scale so resources are limited. Skill or competency shortages must be identified and mechanisms put in place to address them (e.g. foreign language skills, trained chefs, etc.).

The tourism sector must endeavour to improve or maintain high standards and be willing to participate in opportunities for training, research and development. Feedback from the sector is essential to inform progress or highlight issues as they emerge (e.g. tourist accommodation shortages in Dublin creating opportunities for alternative experiences in the west).

Increasingly there is an emphasis on 'cross-promotion' among businesses where they work together (e.g. serving food, providing accommodation and activities) to retain visitors in an area; and extend the tourist season. This approach benefits the wider business community and the visitor benefits from a 'package' of experiences.

Efforts to support communities should continue as they are the ambassadors of Galway, adding significant value to the visitor experience with their warm welcome, wealth of knowledge of history, crafts and music, etc.

Once tourists arrive in Galway, they want 'things to do and see'. Tourism is underpinned by a range of types of infrastructure and facilities and while there are a range of assets on offer, others are required. Options for alternative tourist experiences in east Galway (to that found in the City and west) will need to be explored to ensure an increase in overnight stays rather than brief visits.

Infrastructure is costly to provide, maintain and manage and due to ad-hoc funding sources and a myriad of other issues, delivery can be slow. New experiences and products must be sustainable and an emphasis placed on responsible tourism.

Galway has a range of high quality, uncongested tourist sites and experiences, though visitor management efforts may need to be strengthened. A measured view must be taken of what infrastructure is required and how it will be delivered (across a range of stakeholders, across county or regional boundaries and through a range of funding mechanisms). It is necessary to consider how we deliver 'access for all'. A greater emphasis on cooperation among a range of stakeholders for joint-projects is needed. It would also be useful to identify 'who does what' when it comes to tourism.

Another necessary consideration is how Galway will cope with an influx of visitors in 2020 for the *European Capital of Culture* or should coach and cruise tourist numbers increase. Capacity and access arrangements must be planned in advance.

How can Galway manage its reputation and approach to tourism, monitor progress and improve its offering? Third party endorsements are crucial and visitors rely heavily on the feedback of others. *Trip Advisor* and other digital or print media provide up-to-date qualitative data on visitor experiences, services and activities. Problems which emerge must be fixed or improved to deliver visitor satisfaction.

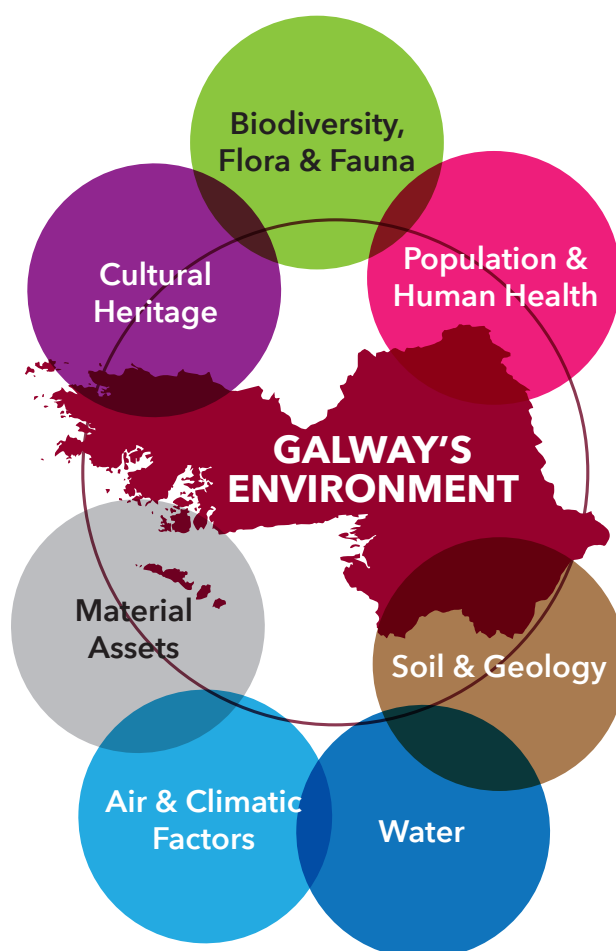
To properly manage and monitor tourism, research and appropriate indicators are required. Given the range of stakeholders involved, a partnership approach or management structure would be beneficial. Consideration should also be given to public and private funding avenues.

Tourism can encourage social inclusion, provide access to the labour market or supplement incomes. However it can have positive and negative effects on the economy, on communities and on the environment. Some members of the

community have concerns about tourism so how do we allay fears about safety or land access arrangements?

There are an incredible range of unique, sensitive and rare species and habitats which require protection, so careful considerations must be given to the design, location and appropriateness of new tourism projects and the effects of existing infrastructure. Opportunities to rectify existing damage caused by tourism-related activities and ensure environmental protection and ongoing management will be explored.

A new Tourism Strategy will be informed by and considered through environmental assessments, namely the processes of Strategic Environmental Assessment (SEA) and Appropriate Assessment (AA)⁸. The image below illustrates the aspects of the environment which will be considered.



⁸ SEA seeks to predict and assess the likely significant environmental effects on a range of receptors of implementing a strategy. AA seeks to examine the impacts of a strategy on European Sites (Special Areas of Conservation and Special Protection Areas) which are protected for nature conservation. Initial consultation has been undertaken with designated Environmental Authorities and the Draft Strategy will be accompanied by SEA and AA reports.

3.0 Proposed Vision, Aims and Action Areas...

The following are the proposed vision, aims and action areas in a new strategy:

‘Galway will be a renowned world-class destination, offering exciting and unexpected experiences from the Wild Atlantic Way to its Lakelands [– a great place to live, explore and immerse oneself and wish to return to!]’

Aims:

1. Increase the number of visitors⁹ and value of tourism;
2. Successfully manage Galway’s reputation, sharing and marketing the experience of Galway, what it stands for, why it’s different and irresistible;
3. Support expanding or emerging tourism businesses (particularly micro and medium-sized) to create excellent products, visitor experiences and attract investment;
4. Support communities to be the ambassadors of the region – instilling pride, a strong sense of place and showcasing our unique heritage and culture, land and seascapes;
5. Guide, develop and provide sustainable world-class products and experiences - relevant to the market and Galway’s communities; and
6. Work in partnership, listen and remain accountable and willing to innovate.

Action Areas:

The proposed approach to developing a strategy is based on three action areas, namely **‘reputation management and branding’**, **‘capacity building and engagement’** in the sector and among communities and **‘experience (or product) development’** (which includes the projects, visitor management and interpretation and different types of experiences from recreation to food, social, historic or cultural events).

A number of associated sub-actions have been assembled from research and initial consultation (see diagram overleaf).

It is recognised that there is ample work ahead and a collaborative and integrated effort is required to increase the success of tourism in Galway.

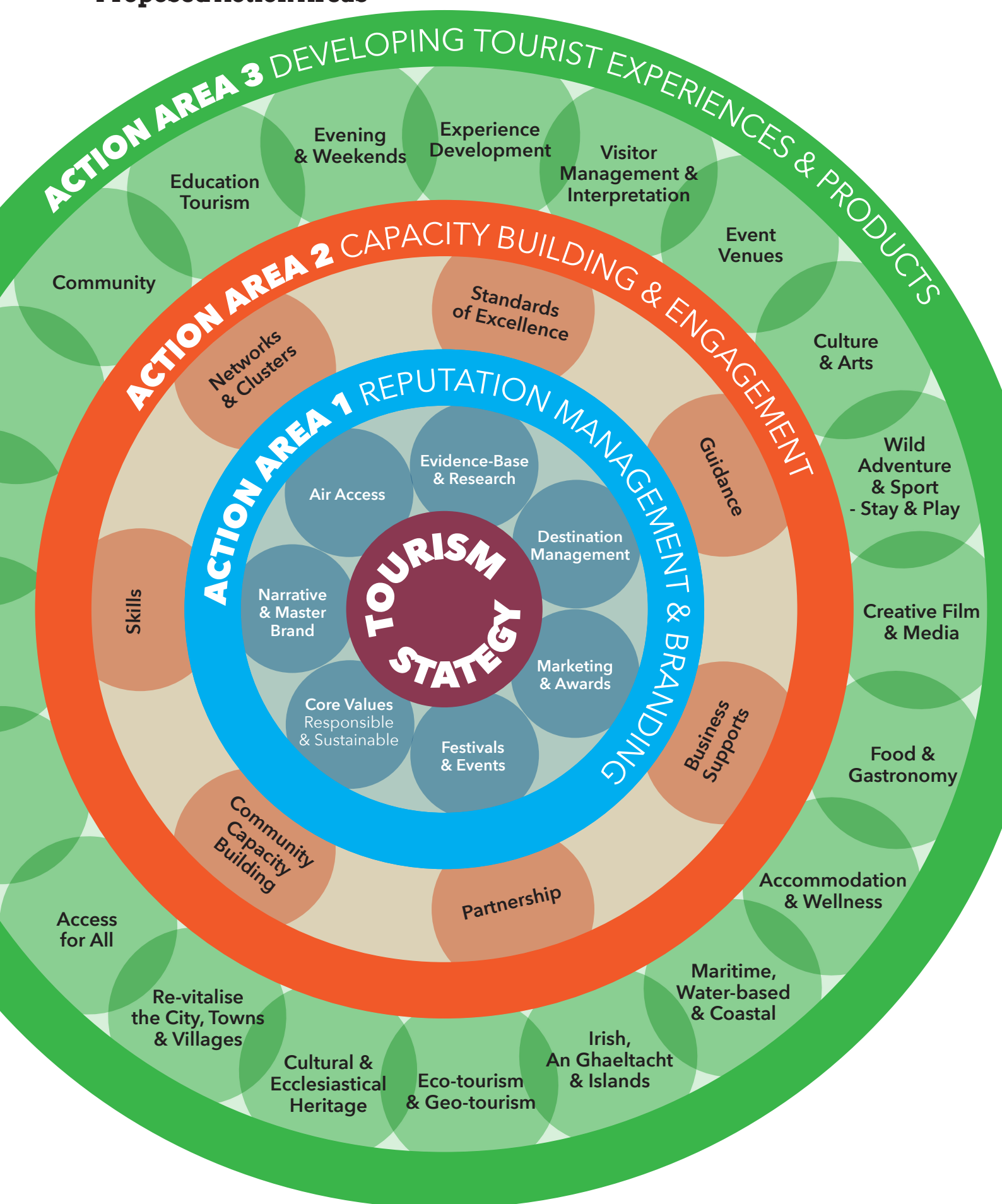
A tourism strategy can offer opportunities to create better places for communities to live as well as for people to visit.

A multi-sectoral and multi-disciplinary stakeholder approach will be required and it is hoped that tourism can offer opportunities to more communities to supplement incomes and increase the potential for steady year round trade for the sector (whether extending the peak season with the overseas market or targeting the domestic market in shoulder seasons and off-peak seasons). There are likely to be multiple benefits from an extended tourist season.

The topics raised during initial consultation and an examination of Galway’s strengths, challenges, opportunities and threats are explored below.

⁹ This will include overnights.

Proposed Action Areas



4.0 Outcomes of Consultation So Far...

A significant amount of information was collected as part of the initial research and discussion. Consideration was given to the outcomes of industry events and bidding processes for Galway 2020 – European Capital of

Culture and European Region of Gastronomy 2018. A wide range of issues with cross-cutting themes emerged (see below) and included discussion on the tourism sector, tourism development and a proposed strategy.



5.0 Strengths, Challenges, Opportunities & Threats...

Strengths

1. A long tradition as a tourism destination
2. Recognised as the cultural heart of Ireland
3. Galway City is the regional capital; the City, Aran Islands and Connemara are strong performing visitor destinations
4. An attractive location where people want to live, work or visit - ranks highly in international reviews
5. An impressive range of accolades including *UNESCO City of Film* & others
6. Excellent community contribution in recent competition bid processes
7. Safe communities with a 'sense of place'
8. A high quality environment

Challenges

1. Develop Galway's marketing and deliver destination management and world class visitor experiences
2. Continue the momentum and support a collaborative approach
3. Respond to tourism market needs and support community needs
4. Maintain strong performing areas and boost the weaker areas
5. Lack of a dedicated budget
6. Tourists need a high class public infrastructure but don't provide for it
7. Raising service standards and foreign language skills/ up-skilling to compete
8. Increasing occupancy levels and revenue per available room (Rev PAR)

Opportunities

1. Foster tourism with a new tourism strategy, support reputation management, capacity building and experience/ product development
2. Define the tourist experience and develop a coherent Galway brand
3. Economic growth in Galway's source markets (North America and Mainland Europe)
4. The delivery of European Region of Gastronomy 2018 and Galway 2020 to increase international visibility
5. Provide accessible information on tourism products in multiple languages
6. Develop the skills, competencies and capabilities of the sector
7. Protect the natural environment

Threats

1. Small open economy and global shocks
2. Currency changes, any increase in the 9% VAT rate and not remaining Value for Money
3. Any complacency in the tourism sector or among public bodies
4. Forgetting the market needs, focusing on the domestic market instead of targeting overseas visitors (for growth)
5. Difficulty competing with other markets
6. If there is a lack of engagement with the Wild Atlantic Way/a new Galway brand
7. Lack of up-to-date data and indicators
8. Fragmented nature of the sector
9. No ring-fenced funding mechanisms and multiple organisations providing ad-hoc tourism infrastructure and facilities