Enhancing the Visitor Experience

Tourism Conference 2018

Fermanagh & Omagh District Council
Conhairí Contae Fheair Manach agus na hOíl

EXPLORE Omagh & The Sperrins Region

Fermanagh Lakelands
Mr Joe Lindsay
TV Presenter
BBC & RTE ‘Getaways’
09:40 Ice Breaker – Getting to Know You!
09:50 Session One Commences
11:20 Comfort Break
11:45 Session Two Commences
13:00 Networking Lunch
14:30 Site Visit to Ulster American Folk Park
Councillor Howard Thornton  
Chairman  
Fermanagh and Omagh District Council
Enhancing the Visitor Experience

Ice Breaker

Introduce yourself

Sell your business

Share one Stand Out Fact

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Enhancing the Visitor Experience

Tourism Conference 2018

John Mc Grillen
CEO Tourism NI

Northern Ireland Tourism Context
Northern Ireland tourism going strong

£926 million – record tourism spend*

4.9 million visitors

£2.5m spent by visitors per day

65,000 jobs
Tourism 2030

**Goal**

Double the value of NI Tourism to £2bn by 2030 and create 25,000 new jobs

**An internationally compelling Experience Brand** built upon our Landscape, Heritage & Culture, renowned for World Class 3-5 day breaks

**Core markets**

NI, RoI, GB, France, Germany, North America, Australia, China

**Focusing on these segments**

Culturally Curious, Social Energisers, Great Escapers, Golf, Screen Tourism, Cruises, Conferences & Incentives

**Consisting of**

Regional dispersion, Year round business

**Driven by**

World class products, visitor experiences & events

**Delivered by**

An internationally competitive industry with access to An available, skilled labour pool

**Enabled by**

Timely consumer insight/market intelligence, Tourism Growth Fund, Quality transport, accommodation, food & digital infrastructure, Increased access to NI & easier access from Dublin/ RoI, Agency/Industry/Government/Local Authority collaboration, Travel Trade, Supportive policy environment

**Underpinned by**

SUSTAINABILITY
Dispersal opportunity

66% of NI spend in 3 of 11 council areas*

Season extension

Evening economy

NI share of IoI**
## Tourism Expenditure

<table>
<thead>
<tr>
<th>Area</th>
<th>Expenditure 2014 (£m)</th>
<th>% of NI expenditure 2017</th>
<th>Expenditure 2017 (£m)</th>
<th>% of NI expenditure 2017</th>
<th>2014/17 change in expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belfast</td>
<td>246.4</td>
<td>33%</td>
<td>328</td>
<td>35%</td>
<td>33%</td>
</tr>
<tr>
<td>Causeway Coast &amp; Glens</td>
<td>131.3</td>
<td>18%</td>
<td>193.6</td>
<td>21%</td>
<td>47%</td>
</tr>
<tr>
<td>Newry, Mourne &amp; Down</td>
<td>53.6</td>
<td>7%</td>
<td>90.4</td>
<td>10%</td>
<td>69%</td>
</tr>
<tr>
<td>Fermanagh &amp; Omagh</td>
<td>62.8</td>
<td>8%</td>
<td>56.7</td>
<td>6%</td>
<td>-10%</td>
</tr>
<tr>
<td>Derry City &amp; Strabane</td>
<td>39.5</td>
<td>5%</td>
<td>55.8</td>
<td>6%</td>
<td>41%</td>
</tr>
<tr>
<td>Ards &amp; North Down</td>
<td>44</td>
<td>6%</td>
<td>46.5</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Mid &amp; East Antrim</td>
<td>53.3</td>
<td>7%</td>
<td>43.3</td>
<td>5%</td>
<td>-19%</td>
</tr>
<tr>
<td>Antrim &amp; Newtownabbey</td>
<td>37.1</td>
<td>5%</td>
<td>32.8</td>
<td>4%</td>
<td>-12%</td>
</tr>
<tr>
<td>Armagh City, Banbridge &amp; Craigavon</td>
<td>28.1</td>
<td>4%</td>
<td>32.4</td>
<td>3%</td>
<td>15%</td>
</tr>
<tr>
<td>Lisburn &amp; Castlereagh</td>
<td>22.4</td>
<td>3%</td>
<td>26.6</td>
<td>3%</td>
<td>19%</td>
</tr>
<tr>
<td>Mid Ulster</td>
<td>26.4</td>
<td>4%</td>
<td>20.1</td>
<td>2%</td>
<td>-24%</td>
</tr>
<tr>
<td><strong>Northern Ireland</strong></td>
<td><strong>745</strong></td>
<td><strong>100%</strong></td>
<td><strong>926</strong></td>
<td><strong>100%</strong></td>
<td><strong>24%</strong></td>
</tr>
</tbody>
</table>
Standout in crowded market

Assurance of enough to see and do

Compelling experiences

Join up in an imaginative way

“A product is something you buy, an experience is something you remember”
Collaboration is key

Collaborate to compete workshops

TNI Cluster Programme++

TNI ROI marketing activity and campaigns ++

TI Campaigns
Thank You
Enhancing the Visitor Experience

Mr Shane Clarke
Director of Corporate Services, Policy & NI Tourism Ireland

Tourism Conference 2018
Marketing the island of Ireland overseas
Creating 'Stand Out' Experiences for Fermanagh & Omagh

Shane Clarke,
Director of Corporate Services, Policy and Northern Ireland

Tourism Ireland
Marketing the island of Ireland overseas
Enhancing the Visitor Experience

Island of Ireland 2018

Revenue
€6.1bn

Visitors
11.2m

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300,000 jobs

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Fermanagh Lakelands

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Northern Ireland 2018 Forecast

Revenue
£589m

Visitors
2.2m

61,000 jobs

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Fermanagh Lakelands
Promotional Themes (Clusters)

- Causeway Coastal Route
- Belfast
- Screen Tourism
- Wild Atlantic Way
- Ireland’s Ancient East
- Dublin

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Leveraging our Digital Footprint

Visits
20m+

Referrals
4.5m

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Social Media Reach

#4
4.3m+ fans
Avg. 200 friends
800m+ reach

#4
49.3m views

#4
475k followers

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Screen Tourism

**Star Wars**
- 104m Reach
- €16.5m EAV

**Game of Thrones**
- 120m Reach
- €23m EAV

30+ Awards

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Cónaill Creaghtan
Fheargh Mharaigh na hOmain

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Global Greening

50 COUNTRIES

304 ICONIC LANDMARKS

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Home of Champions

The Open 148th Royal Portrush

6.5m Reach

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Promoting Northern Ireland food
Enhancing the Visitor Experience

Northern Ireland Industry Participation Overseas

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Fermanagh Lakelands
2018 Targets
Northern Ireland

Revenue
£589m

Visitors
2.2m

61,000 jobs
Thank You
Councillor Thomas O’Reilly
Chairman
Fermanagh and Omagh
Tourism and Economic Partnership
Tourism in Fermanagh and Omagh

Visitor Origins
- 62% NI
- 18% GB
- 14% ROI
- 4% Mainland Europe
- 3% North America

Spend £57m

Holiday/pleasure/leisure

630,613 visits to visitor attractions in Fermanagh & Omagh LGD in 2017

Belleek Pottery Visitor Centre and the Ulster American Folk Park were the most popular visitor attractions in Fermanagh & Omagh LGD in 2017 (excluding country parks/parks/forests/gardens)
Tourism in Fermanagh and Omagh

Two Visitor Offerings

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Fermanagh Lakelands
Marketing Highlights 2018

• Working Group formed June 2017
• New Website created with views up by 95%
  www.exploreomaghperrins.com
• New Facebook Page Created Likes up by 60%
• 21 Businesses in discount voucher booklet
• Secured 7 press visits and 2 more upcoming
• New Promotional Backdrop & Fliers
Marketing Highlights 2018

• Increase in collaborative campaigns
  Spring, Summer & Autumn campaigns co-ordinated by Fermanagh Lakeland Tourism
  Supported by the trade, Council, Waterways Ireland, Enniskillen BID and National Trust

• 30% increase in website hits

• Increased focus on Digital platforms

• PR campaigns have resulted in over 30 million ‘Opportunities to See’ the Fermanagh Lakelands

• Representation at 10 Consumer & Trade Exhibitions
Marketing Impacts 2018

- 53% of Members indicate an increase in business from July to September
- Increase in visitors from NI, ROI & GB
- Increase in new group business
  Some providers recording 20% increase on 2017
- Increase in Press & Travel Trade Fam Trips
Challenges Ahead

- VAT
- Getting Here – Infrastructure / Air passenger duty
- Competing Destinations
- BREXIT

We’re Unique, Just like Everyone Else!!
Opportunities

• Key Markets
  GB & ROI
  Maintaining Domestic Market

• Co-operation
  Within the District
  With our neighbouring Counties
  Cross - Border

• Technology
  Booking Systems
  Digital Marketing
  AR / VR Experiences
Opportunities

Developing Experiences

- Recognised Worldwide as a strategy for Rural Tourism Development
- Sustainable Long Term approach to Tourism Development
- Extends Destination Life Cycle

Definition of Insanity is doing the same thing over and over again and expecting different results...

Albert Einstein
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Experience Development

Envelope One

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EXPLORE Omagh & The Sperrins Region
Fermanagh Lakelands
EXPLORE Omagh & The Sperrins Region
Ms Kate Taylor
Tourism Clusters
Collaborating for Success

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Why do some destinations succeed... when others don’t?

What sets the “successful” destinations apart?

What can we learn from them?
The Characteristics of a ‘Successful’ Destination

- Critical Mass
- Mindset of Co-opetition

→ Shared Vision
The Characteristics of a ‘Successful’ Destination

Critical Mass

+ Mindset of Co-opetition

Shared Vision
‘Critical Mass’ in a Tourism Clusters

“Clusters are geographic concentrations of interconnected companies in a particular field, linked by commonalities and complementarities”

Michael E. Porter
Harvard Business School
‘Critical Mass’ in a Tourism Cluster? (e.g. Cairns)

- Public Relations & Market Research Services
- Food Suppliers
- Property Services
- Maintenance Services
- Travel Agents
- Tour Operators
- Local Retail, Health Care, and Other Services
- Local Transportation
- Souvenirs, Duty Free
- Banks, Foreign Exchange
- Government Agencies (e.g., Australian Tourism Commission, Great Barrier Reef Authority)
- Educational Institutions (e.g., James Cook University, Cairns College of TAFE)
- Industry Groups (e.g., Queensland Tourism Industry Council)

Restaurants

Hotels

Attractions and Activities (e.g., theme parks, casinos, sports)

Airlines, Cruise Ships

28 November 2018
The Characteristics of a ‘Successful’ Destination

Critical Mass + Mindset of Co-opetition → Shared Vision

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Co-opetition in Tourism:

- Competition at local level
- Co-opetition In Tourism
- Cooperation at destination level

“We work together to bring them into Kinsale... And then we fight over them when they get here!”

Hal McElroy
Kinsale Chamber of Tourism
The Characteristics of a Tourism Cluster

Critical Mass

Mindset of Co-opetition

→

Shared Vision

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How do you develop YOUR ‘Shared Vision’?
Who are they?
What do they want?
What else do they want to do?
How do they buy?
What are they willing to pay?
What do they want to hear? What will capture their attention? What tone, level of detail, level of formality?
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Conshairé Ceantair
Fheamhchas na hOídeál

EXPLORE Omagh & The Sperrins Region

Fermanagh Lakelands

Online & Offline Direct & Indirect Traditional & New
Top 4 Challenges for Tourism Destinations

1. Differing objectives
2. Complacent/competitive community participation
3. Biting off more than you can chew!
4. Maintaining momentum
Key Learnings from other Tourism Clusters...

➢ Draw in the movers & shakers early on... but share the workload

➢ Cluster by facilitation... not by analysis

➢ Move early into action... to maintain momentum

➢ Build for the long term... but celebrate short term successes
And in the meantime ...
Some Learnings from Destination Marketing Initiatives
Enhancing the Visitor Experience

Sell the Destination FIRST

Discover big skies and starry nights

BOOK NOW
Enhancing the Visitor Experience

Sell the Destination FIRST...

And then your business

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Segment your market by interest...

Activity holidays

Break from your regular routine & come out to play. Wales comes well equipped for outdoor adventure and UK activity hol an activity break, a solo traveller wanting outdoor adventure or a family seeking a multi activity holiday. Wales has plenty of and provide you a real adventure holiday.

What would you like to do?

Click on an icon below for more information

- Biking
- Bushcraft & Foraging
- Fishing
- Golf
- Horse Riding
- Rock & Ropes
... then show them what’s on offer!
Have a Top 10... or top 99... or Top 101 things to do!
Use real people in your images!

Kia Ora
Welcome to the official travel website for New Zealand

Get inspired
New Zealand must-do experiences
Top New Zealand trips
Adventure & adrenaline
Food & wine
Backpacking
Family fun
Luxurious getaways

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Fermanagh & Omagh District Council
Contraire Ceannaire
Fheach Machuig na hOíde
EXPLORE Omagh & The Sperrins Region
Fermanagh Lakelands
Think outside the box!

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Ah, your smartphone — that magical device you rely on for texting, tweeting, and, er, calling people. But, let’s not forget one of the most popular ways you use portable technology: the selfie. Come on, we all do it. From basking in the sun on a vacation to butting heads with your ladies on a Friday night, these DIY portraits have become a social-media mainstay.

But, make no mistake: You need not be on an incredible vacation to take a stellar solo snap. Your next stop could be one of these 10 rad spots to take a selfie in Chicago!
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Engage with Current Trends!

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Contae de Bhantair
Aontach na hÉireann

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Engage with Current Trends!

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Fermanagh & Omagh District Council
Conairte Ceantar
Fhearchais agus na hÓmaí

Fermanagh Lakelands
Piggy back on LOTS of Events!
Tailor to your Geographic Market

Travel to NZ

Enhancing the Visitor Experience

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Integrate Ratings & Reviews

---

**RATINGS & REVIEWS**

🌟🌟🌟🌟🌟 Based on 141 reviews on TripAdvisor

---

**May 6, 2015**

sjones5572

“Amazing!”
My husband brought me here for my birthday. Everything was excellent! Loved that he was able to make dinner as we heard the sounds of the ocean. The room was a short walk to the beach. I already am looking forward to going back.

---

**March 12, 2015**

vptrout

“Would never stay there again!!!!”
Stayed there on March 6, 7, and checked out on the 8th. We had left our room around 11 to go enjoy the day. Came back about 4ish and noticed the room had not been cleaned. Called down to the lobby. They said they don’t clean rooms until you check out. And we were also told that the service staff had already went home. You would think for a $192.27 per night you would get your room cleaned and fresh linens....Guess not. I would NEVER recommend this place to anyone! There are a lot of other hotels in the area...Use them and not D Sands. And last point...The staff is RUDE and treat you horribly. Customer service my friends is a big thing nowadays. They are not customer friendly that’s for sure.
Encourage Interaction & Engagement

Visit Holland @visitholland 29 May 12

Have you visited Naarden? The city is one of the best preserved fortified towns in Europe: budurl.com/zf3z

BarryPiatoff @BarryPiatoff

@visitholland Haven't been to Naarden but my wife & I plan to visit Deventer in early summer as part of our annual trip to Holland.

6:52 PM - 29 May 2012
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Make Maps FUN!

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EDIBLE MAP OF DUBLIN

#LoveDublin

Fermanagh & Omagh District Council
Cumsíon Contae na hÓmhairge

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A Rising Tide lifts ALL Boats!

PARIS

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Fhear Manach agus na hÓmaí

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‘If you want to go quickly, go alone.

If you want to go far, go together.’
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Experience Development Envelope Two

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Fhaire Mharaí agus na hÓmaí

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Comfort Break

Session Two Commences
11:45 am Sharp
Tourism Cluster Research
A Wild Atlantic Way Perspective

Kelly O’Sullivan-Browne
Institute of Technology Tralee
Research

- Recognised worldwide as a strategy for rural tourism development
- Sustainable long-term approach to economic development V quick fix
- Centres of Excellence (education, training & development services)
- Extends destination Life-Cycle through spin offs, NPD, Entrepreneurship
WHAT A CLUSTER LOOKS LIKE

- Competitive Destination
- Triple Helix (education, business, govt. sectors)
- Integration of products and services
- NPD & Innovation & Investment
- Market leaders not followers
- Outcome: Buzzy sticky places! draws new people and new businesses
- Great places to work & live
Examples of WAW Tourism Clusters

Kinsale
Killarney
Westport Greenway route
Clifden
Galway Bay area
Limerick Shannon Region
Dingle
Kenmare
Emerging Destinations

- Regionality
- Fragmented product
- Seasonality of Industry
- Lack of information and interpretation
- Access: Broadband & Public transport
- Life-Style Entrepreneurs & Market Orientation
- Lack of investment
- Viability?
Wild Atlantic Way Research

5 Emerging networks (20% response rate)
6 Experts in tourism networks
Mixed Methods Inquiry (Quant and Qual)

How did the networks emerge?
What were the benefits?
What were the success factors, barriers and challenges?
Can networks drive tourism cluster development in rural areas?
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Survey Respondents

PERSON
Older, educated, local to their area, running family inter-generational business, a long-term vision, prepared to put the destination first

BUSINESS
Highly seasonal, less than 5 full-time employees including their spouse, staff are part-time & seasonal. Difficult to find staff, mainly concerned with rising operational costs

ATTITUDES
Positive attitude to networking “important but find it hard to make time” not sure of the benefits. Involved mainly to show support for others. Low expectations of positive outcomes other than group marketing opportunities
WAW Network Coordinators

Critically underfunded
Lack leadership and direction
Same few people volunteer
Marketing & communications function/benefit
Lack skills & expertise, often feel out of their depth

“My first task every year is to source funding for my own salary..”
Key Research Finding

Participation in networks not enough to drive tourism in rural areas & creating new visitor experiences

✓ Interfirm Collaboration
✓ Learning from each other
✓ Supporting and leaning on each other
✓ Sharing business knowledge with competitors
✓ Sharing tacit know-how & insider information
What does success look like?

- Community driven networks, bottom up ... not top down
- **Networks that take time to grow & listen**
- Relationship building is paramount
- **Democratic transparent structures**
- Meetings are only held in conjunction with other events (like training)
- **Excellent internal and external communication**
- Any award or recognition is celebrated by all
- Network’s ethos and values are understood and shared, & aligned with values of the destination/community
- Network talks about collaboration and what that might look like
Burren Eco Network, Co Clare

- Two competing providers Ailwee Caves and the Doolin Caves
- Walk in the Visitors Shoes.. won’t go to both so we need to work together
- Creating a new product to encourage more visitors
- Sharing and referring business to each other
- Network pin-ups for destination; they tell the B.E.N. story of collaboration
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Best Practice

Networks
Focus on collaboration, build relationships...networks are people. Put the people before the projects, the process before the outcomes

Business Communities
Get behind your network, be brave, get creative.. tell and sell your story but stick to what is true and protect your natural assets. Put collaboration at the centre of your network

Local government and supporting agencies
See beyond the projects, provide leadership, provide capacity building, trust creatives, back the people involved. Networks need a (really good funded) coordinator..
“Competition makes us Faster; Collaboration makes us Better.”

Pyrefly
26 Mar 2013 9:57 pm
Mr Mark Rodgers
Dalriada Kingdom Tours
Causeway Coastal Route
Enhancing the Visitor Experience

Mr Brian Leonard
Corralea Activity Centre Ltd.
Fermanagh Lakelands Cluster

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Fermanagh Lakelands
About Me
Youth ~ Travel ~ Role at Corralea
Corralea Activity Centre Ltd.
Est. 1994
Family Run, Seasonal Business
We Offer...

...Activities
... Accommodation & Packages
Why Take Part in a Cluster?
- Too small to work alone
- To be part of a new Venture
• Potential to Offer Unique Experience
Our 4 Day Ebike Adventure
Tripaneer.com

Day 1: Arrive & Settle In

Day 2: Ebike Tour

Day 3: Free Day to Explore

Day 4: Depart
...Promote Rural Fermanagh
Panel Discussion

Q&A

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Enhancing the Visitor Experience
Enhancing the Visitor Experience

Mr Brendan Hegarty
Chief Executive
Fermanagh & Omagh District Council

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Thank You