



TOURISM IS EVERYONE'S BUSINESS

Local authorities' role in tourism development



Tourism is Everyone's Business

Tourism is an important driver of local, regional and national economies, and is a critical component of local authorities' work.

The role local authorities play in tourism development is multi-faceted and includes:

- developing, maintaining and running attractions;
- providing leisure and tourism infrastructure;
- supporting festivals and events;
- developing and implementing tourism plans and policies;
- planning, place-making and managing our natural and built environment; and,
- working with communities, businesses and other agencies to improve the local tourism offering.

Tourism supports approximately 240,000 jobs across the country. Tourists from overseas bring more than €5bn into the country, while domestic tourism is worth a further €1.9bn. An important aspect of the tourism industry is that it contributes to balanced economic development and offers employment opportunities across the country, including in remote areas that might otherwise find it difficult to maintain industry or employment.

Local authorities act as a conduit and activation partner between agencies and local communities, collaborating with Fáilte Ireland, the Department of Transport, Tourism and Sport, and other Government agencies, and harnessing EU funding and private investment to enhance the tourism offering in their areas. Between 2014 and 2018, the local government sector invested €99.4 million and harnessed a further €86.4 million from other agencies towards the development of tourist attractions. Local authorities have plans to develop more than 250 new tourist offerings nationally, with investment of €361.3 million committed to these projects from local authority and other agencies.

Local authorities play a pivotal collaborative role supporting local communities and businesses to harness the tourism potential of their areas. Local insights help to identify potential tourist attractions. With unique expertise and understanding of local culture and heritage, local authorities can provide authentic experiences, and deliver and promote these experiences in a manner that is both environmentally and financially sustainable.

The tourism sector has experienced a period of buoyancy, with the number of domestic and overseas tourists visiting Ireland consistently increasing over the last eight years. However, our closest neighbour, Britain, accounted for 35% of our overseas tourists in 2018 and with the UK about to leave the EU, local authorities and partners in Fáilte Ireland, Tourism Ireland and Government will have to work hard to mitigate against the impact of Brexit and expand our markets and offerings to sustain our progress in increasing tourism development.

Between 2014 and 2018, the local government sector invested €99.4 million and harnessed a further €86.4 million in investment from other agencies towards the development of tourist attractions.

Local authorities and tourism in numbers

DEVELOPING ATTRACTIONS

2014-2018 **€99.4** MILLION
DIRECTLY IN TOURIST ATTRACTIONS

CAPITAL FUNDING OF

€86.4 MILLION
FROM OTHER AGENCIES

RUNNING ATTRACTIONS

LOCAL AUTHORITIES

RUN OR SUPPORT **462**
TOURIST ATTRACTIONS

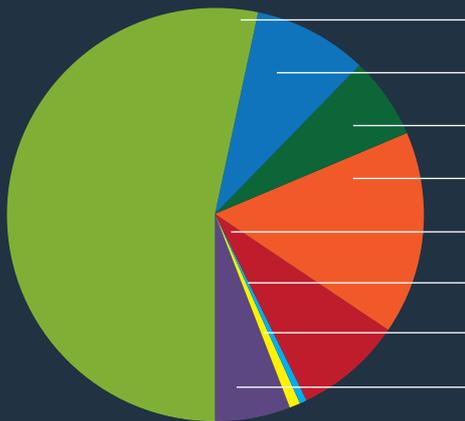


LOCAL AUTHORITIES CONTRIBUTE ALMOST

€52 MILLION
TO SUPPORT TOURIST ATTRACTIONS



INVESTMENT IN DEVELOPING ATTRACTIONS



LOCAL AUTHORITY FUNDING: **€99.4 MILLION**

FÁILTE IRELAND: **€16.4 MILLION**

EU FUNDING: **€12.1 MILLION**

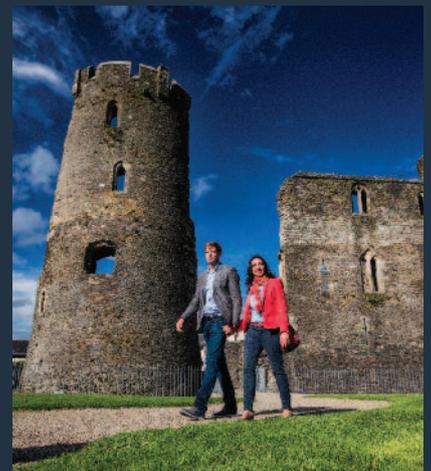
DEPARTMENT OF TRANSPORT, TOURISM AND SPORT: **€29.3 MILLION**

DEPARTMENT OF CULTURE, HERITAGE AND THE GAELTACHT: **€15.3 MILLION**

HERITAGE COUNCIL: **€1.5 MILLION**

LOCAL SPONSORSHIP: **€1.1 MILLION**

OTHER: **€10.8 MILLION**





INFRASTRUCTURE
IN 
2018 **€7.4** MILLION
INVESTED IN TOURISM
IN LOCAL AUTHORITY AREAS

EVENTS
1,416 COMMUNITY
EVENTS
AND FESTIVALS

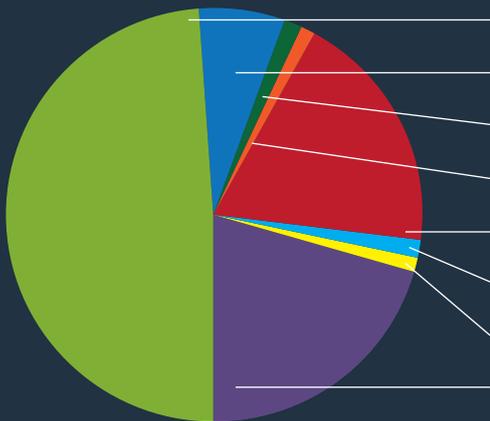
INNOVATION
292 INNOVATIVE
TOURISM
INITIATIVES



€4.8 MILLION
SPENT ON
TOURISM
INITIATIVES

€156.3 M
WILL BE PROVIDED BY LOCAL AUTHORITIES
FOR NEW TOURIST ATTRACTIONS

INVESTMENT IN TOURISM INFRASTRUCTURE



- LOCAL AUTHORITY FUNDING: **€3.6 MILLION**
- FÁILTE IRELAND: **€0.5 MILLION**
- EU FUNDING: **€0.1 MILLION**
- DEPARTMENT OF TRANSPORT, TOURISM AND SPORT: **€0.07 MILLION**
- DEPARTMENT OF CULTURE, HERITAGE AND THE GAELTACHT: **€1.4 MILLION**
- HERITAGE COUNCIL: **€0.1 MILLION**
- LOCAL SPONSORSHIP: **€0.08 MILLION**
- OTHER: **€1.5 MILLION**

FUTURE PLANS
256
NEW TOURIST
OFFERINGS
NATIONALLY

Local authorities' tourism role in context

Local authorities have long recognised the value of tourism as a contributor to the local economy and actively engage with communities, business, and State agencies to develop their local tourism experiences.

The reform of local government in 2012 strengthened local authorities' role in economic development, with tourism taking a central place in their economic ambitions.

In March 2015, the Government published its Tourism Policy Statement: *People, Place and Policy – Growing Tourism to 2025*, which committed to “an enhanced role for local authorities and recognition of the contribution of communities to tourism”. Specifically, the policy sets out that local authorities will:

- continue to act as the primary developers of a range of public tourism infrastructure, including outdoor tourism infrastructure and urban and rural heritage;
- act as a link between State tourism agencies and communities by supporting community efforts regarding major national tourism initiatives;
- support community effort in destination development, including assisting communities to align their efforts with the tourism agencies' brand architecture and consumer segmentation model;
- provide a competitive environment for tourism enterprises through continued focus on high quality maintenance of public infrastructure frequently used by visitors;
- contribute to capacity building in tourism nationally by co-ordinating exchange of knowledge between established and developing tourism destinations; and,
- provide advice and support through Local Enterprise Offices.

The strategy also established three primary targets for tourism development nationally:

1. generating tourism revenue of €5 billion annually net of inflation and excluding carrier receipts;
2. employing 250,000 people in the tourism sector; and,
3. attracting 10 million overseas visitors to Ireland annually.

The Government's *Tourism Action Plan 2016-2018* set objectives for how these ambitious targets would be achieved.

Considerable progress has been made; by the end of 2018 tourism revenue excluding carrier receipts totalled €5.1 billion and overseas tourist numbers to Ireland reached 10.6 million¹. According to Fáilte Ireland, total employment in the tourism and hospitality sector is estimated at 240,000 jobs.

The Government's *Tourism Action Plan 2019-2021* aims to build on the achievements to date, with clear objectives identified for key stakeholders. Local authorities were involved in the development of the strategy and are again at the heart of delivering ambitious objectives.

Although much has been achieved in the sector during this period, continued growth cannot be assumed, given the industry's exposure to external events – political, economic and other.

Brexit is a major concern for the tourism industry. Although it is not yet clear how the UK's decision to leave the EU will play out, its exit undoubtedly presents a challenge.

Managing this challenge and achieving the ambitious objectives set out in *People, Place and Policy – Growing Tourism to 2025* will require concerted, collaborative and sustained efforts from stakeholders at all levels.



A key objective of each local authority is to strengthen the attractiveness of the region and local area to tourists.

National policy, local delivery

Arising from *People, Place and Policy – Growing Tourism to 2025*, each local authority has developed a Tourism Statement of Strategy and Action Plan setting out their tourism objectives.

Each Action Plan sets out a work programme of investment and promotion to be undertaken by the local authority and its partners. The key objective of each is to strengthen the attractiveness of the region and local area to tourists. These Tourism Statements of Strategy and Action Plans align with tourist trends and national, regional and local tourism policies, strategies and plans.

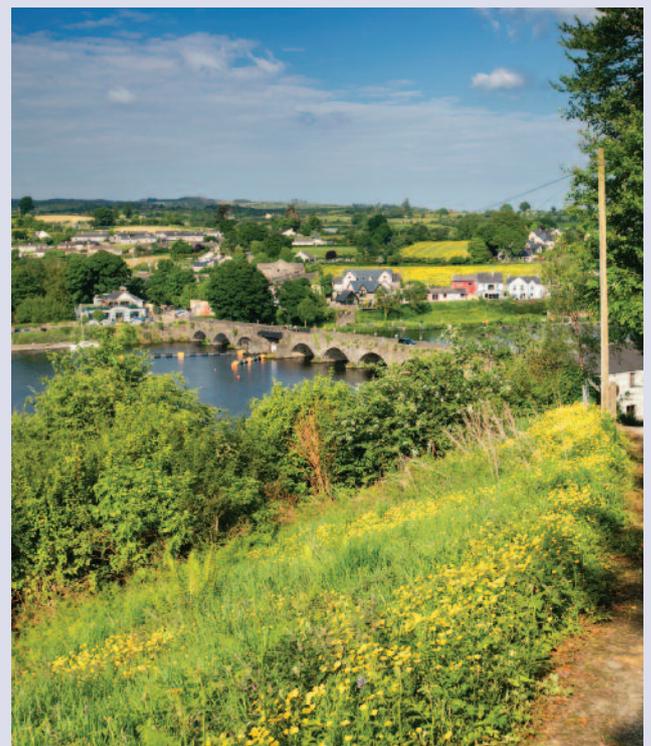
In addition, each local authority has a Local Economic and Community Plan (LECP). The implementation of the LECPs is overseen by the Local Community and Development Committee (LCDC), which is a committee of the local authority.

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

¹Central Statistics Office (2018) Tourism and Travel.

Each local authority has a tourism strategy and designated tourism officer.

Fáilte Ireland and the County and City Management Association (CCMA) have signed a Memorandum of Understanding committing both organisations to work together on tourism development in strategic areas including capital investment projects, training supports, information provision and joint marketing campaigns to attract domestic and overseas visitors.



Tourism trends

Tourism is Ireland's largest indigenous industry, generating 4% of gross domestic product (GDP) and employing 240,000 people nationally.

Tourism is at the centre of balanced regional growth and economic activity. In many regions, tourism is a primary economic activity and sustains thousands of jobs including in rural areas. Research by Fáilte Ireland shows each additional 1,000 overseas tourists support 20 jobs in the tourism industry¹.

Overseas visitors increasing

Between 2014 and 2018 the number of trips to Ireland from overseas visitors increased by 39.6% from 7.6 million annually to 10.6 million. Excluding fare receipts by Irish carriers, those visiting Ireland from overseas spent €5.15 billion in 2018 in comparison to €3.55 billion in 2014.

Overseas tourist numbers in 2018 reached record levels following eight years of consecutive growth.

Compared with 2017²:

- overseas trips to Ireland increased by 6.9% in 2018;
- visits from mainland Europe grew by 9.5% in 2018 to 3.8 million visitors;
- visits from North America increased by 13.5% in 2018 to 2.4 million visitors;
- visits from Great Britain grew by 1% in 2018 to 3.8 million visitors; and,
- visits from the rest of the world, mostly long-haul and developing markets, accounted for 0.7 million trips in 2018 representing an annual increase of 6.8%.

What's the attraction?

Fáilte Ireland Visitor Attitudes Surveys consistently show that some of the reasons most cited by overseas visitors for considering Ireland as a holiday destination are beautiful scenery, the wide range of natural attractions, natural unspoilt environments, interesting history and culture, and attractive cities and towns. Local authorities are directly or indirectly responsible for many of these areas.





Where do tourists visit?

While Dublin attracts the majority of tourists, welcoming six million overseas tourists, who spent €2 billion between them in 2017, the next most popular destinations for overseas tourists were Cork and Kerry, with 2.4 million overseas tourists spending almost €1 billion. Western counties of Galway, Mayo and Roscommon attracted almost two million overseas tourists in 2017 who spent almost €700 million in the region. The mid-western counties of Clare, Limerick and Tipperary attracted 1.4 million tourists who spent almost €450 million in the region. Border region counties welcomed almost 650,000 tourists from Northern Ireland in 2017, who collectively spent €141 million³. Border region counties of Donegal, Sligo, Leitrim, Cavan, Monaghan and Louth represent the largest market nationally for attracting Northern Irish tourists by a substantial margin, highlighting the potential challenges for the region in attracting these tourists post Brexit.

There is considerable scope for more diversified regional tourism growth as well as potential to tap further into the domestic tourist market. For instance, Irish residents took 9.63 million domestic trips in 2017, generating €1.9 billion for the economy⁴, illustrating its importance as a tourist market.

The mid-western counties of Clare, Limerick and Tipperary attracted 1.4 million tourists who spent almost €450 million in the region.

Challenges ahead

Irish tourism continues to perform strongly; however, confidence concerns and uncertainty are showing in the industry with the Fáilte Ireland Tourism Barometer Business Sentiment Index falling consistently since 2015, illustrating that tourist-dependent businesses are less optimistic about future prospects for the industry.

Uncertainties surrounding Brexit, including concern around exchange rate fluctuations, are likely to continue for the foreseeable future. The potential decline in British tourist numbers and revenue is compounded by the fact that post-Brexit Britain is likely to be a competitive alternative to Ireland for overseas tourists from North America, mainland Europe and long-haul destinations.

There are some positive trends however, with visitors from mainland Europe up 9.5% in 2018 and 13.5% growth in visitors from North America compared with 2017⁵.

10.6m overseas visitors spent €5.15bn in 2018.

¹ Fáilte Ireland (2018), Tourism Facts 2017

² Central Statistics Office (2018) Tourism and Travel

³ Fáilte Ireland (2018) 2017 Topline Tourism Performance by Region

⁴ Fáilte Ireland (2019) Tourism Barometer December 2018

⁵ Central Statistics Office (2018) Tourism and Travel

Local authority tourism actions and investment

Local authorities invest significantly in tourism development. The following pages outline the results of a survey of investments and activities by local authorities from 2014-2018.

Tourist attractions

– investing, developing, running

Local authorities make an important contribution to the development of the tourist experience, including in collaboration with communities, the private sector, Government departments and agencies.

Local authorities leveraged a total capital investment of €185.8 million towards tourist attractions from 2014-2018.

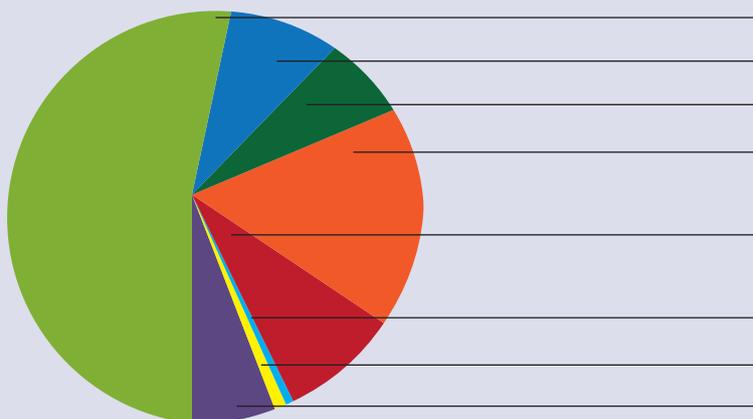
Capital investment

In the period 2014-2018, a considerable capital investment was made by local authorities in the development of the tourist experience.

In that period, local authorities leveraged a total capital investment of €185.8 million towards tourist attractions, with €99.4 million of this investment made by local authorities, while an additional €86.4 million capital investment was provided by other stakeholders.

This excludes investments made in tourist attractions by stakeholders independent of local authority involvement.

INVESTMENT IN DEVELOPING ATTRACTIONS



LOCAL AUTHORITY FUNDING:	€99.4 MILLION
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Operational investment

In 2018, local authorities directly ran 260 tourism attractions and supported an additional 202 attractions operated by private bodies or community and voluntary sectors. Of these 462 attractions, 304 are free of charge. There is great variety in the types of attractions run or supported by local authorities. They include historic houses, castles, gardens, forests, parks, geoparks, blueways, greenways, leisure centres, visitor and interpretive centres, museums, arts centres, theatres, galleries, historic forts, islands, heritage centres and trails, and round towers.

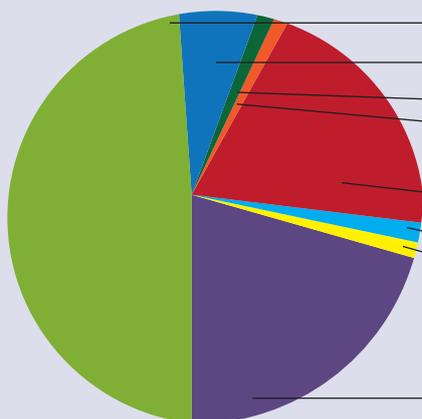
To sustain these tourism attractions in 2018, local authorities contributed almost €52 million for their day-to-day operation in addition to the capital contribution of €99.4 million made between 2014 and 2018.

Future investment

Local authorities have committed to investing €156.3 million to provide 256 new tourism projects and initiatives, many of which are in progress or at planning stage. An additional €205 million will be received from other agencies to support the development of these projects, bringing the total committed investment to €361.3 million for new tourism projects.

Prospective tourism projects for local authorities include developing walking trails; creating new discovery centres; installing signage; restoring historic buildings; developing cultural plazas, greenways and blueways; upgrading parks; running music and cultural events; providing new parks; developing heritage projects; building new visitor centres; harbour development; river and marina attractions; expanding sports facilities; and implementing new promotion initiatives.

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Infrastructure

The types of specific tourism infrastructure work local authorities undertake includes upgrading roads and amenities, maintaining beaches, installing signposts, map boards, interpretive and information panels, building car parks and viewing points, constructing and maintaining walks and trails, erecting bus shelters at tour stops and investing in key pieces of travel infrastructure such as ferry services and airports.

Regional experience brands have proved to be a real success story, gaining international recognition.

In 2018, local authorities invested €3.6 million in tourism infrastructure. They also secured an additional €3.8 million for tourism infrastructure from a range of other external sources including State agencies and EU funding.

Much of the infrastructure local authorities develop involves supporting national brands, in particular the Wild Atlantic Way, Ireland's Ancient East or Hidden Heartlands, which are rolled out in partnership with Fáilte Ireland. These regional experience brands have proved to be a real success story, gaining international recognition.

Festivals and events

According to Fáilte Ireland, festivals and events attract more than 200,000 overseas visitors to Ireland and contribute €108 million to the economy every year. Local authorities run festivals and events, and support national and local or community initiatives.

Festivals and events are recognised as an excellent means by which local communities can celebrate local assets, strengths and history, while taking a targeted approach to attracting domestic and overseas visitors.

Local authorities make a significant contribution to local events. In 2018, local authorities contributed €11.2 million towards festivals and events within their communities across more than 1,400 events.

In addition to financial investments, local authorities support events by allocating staff resources, implementing road closures, providing staging areas, erecting signage, managing traffic and car parking, collecting additional bins, cleaning streets, providing health and safety support, managing events, providing marketing and publicity, licensing, training and providing administrative support.

Thousands of festivals and community events take place around the country each year.



Tourism promotion

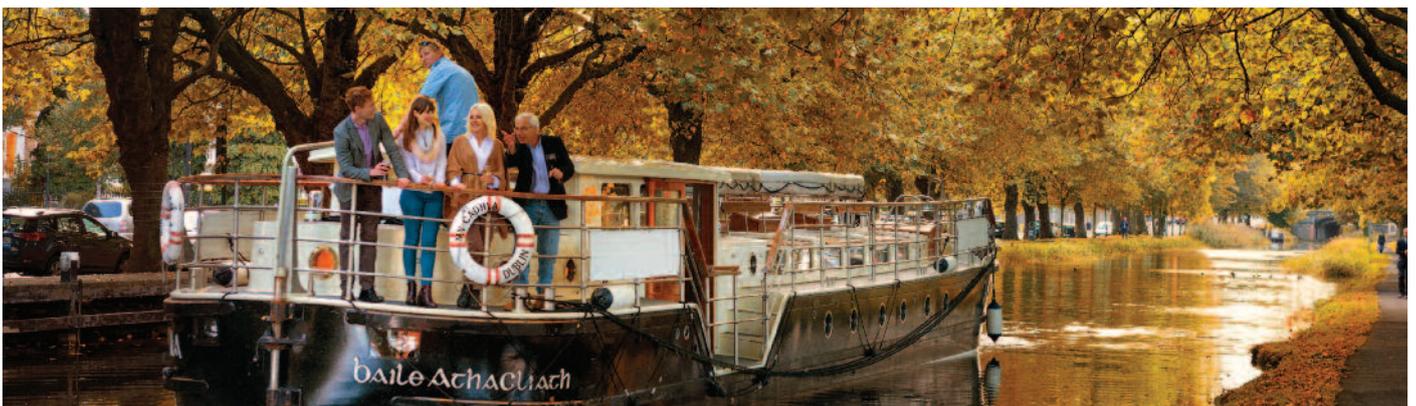
Local authorities work with a range of partners to promote their local area and wider region. Types of marketing activities undertaken by local authorities include: supporting local tourism organisations to bring tourism stakeholders together to enhance tourist offering and promotion; investing in national and international marketing campaigns on TV, radio and online; providing marketing funds for routes to airports and ports; attending consumer and trade fairs abroad; running tourist information offices; holding conferences and events for tourism stakeholders; creating local multi-lingual maps, guides and brochures; creating libraries of promotional images, videos and drone footage; setting up familiarisation trips for journalists and travel companies; pitching to and supporting the production of travel television programmes; and creating local tour group itineraries. Local authorities leveraged €7.9 million for tourism promotion in 2018. Of this, €7.2 million was provided by the local authorities and €0.7 million was provided by a number of stakeholders.

Innovation

Innovation is central to local authorities' tourist offerings. In 2018, local authorities invested €4.8 million in 292 innovative tourism projects and received an additional €1.2 million from a range of other sources to support their efforts.

These include innovative tourism activities such as tourism ambassador programmes; new food/cultural festivals; tourism website enhancements; collaborations with international communities/partners to promote tourism; virtual reality technologies; further education tourism training programmes/qualifications; and 'county' days.

In 2018, local authorities invested €4.8 million in 292 innovative tourism projects.





Committed resources

In 2018, local authorities directly employed almost 300 tourism staff across a range of functions.

Local authorities' tourism initiatives and projects require collaboration across multiple departments with many more staff members temporarily working on tourist events and activities for shorter periods of time throughout the year and staff in other departments working on initiatives, plans, developments, etc., in indirect support of the local authorities' tourism objectives.

References and further reading

People Place and Policy – Growing Tourism to 2025, Department of Transport, Tourism and Sport

Faiiltelreland.ie

TourismIreland.ie

Local authority websites include information on their tourism strategies and action plans as well as on tourist attractions in their areas. Many local authorities have dedicated tourism promotion websites.



Images courtesy of Fáilte Ireland. Survey of local authorities was carried out by the Local Government Management Agency (LGMA) in February/March 2019.



