

Submission in response to

The Northern and Western Regional Assembly's

Draft Regional Spatial and Economic Strategy

Written submissions or observations with respect to the Draft Regional Spatial and Economic Strategy and the accompanying reports may be made between 19th November 2018 and 5pm on 8th February 2019 (both dates inclusive) through one of the following media:

On Line: Completing the RSES Web Submission Form and selecting submit

Email: rses@nwra.ie

Mail: 'RSES Submissions', NWRA, The Square, Ballaghaderreen, Co. Roscommon. F45 W674

RSES Web Submission Form: <https://www.nwra.ie/rses/>

The Irish Tourist industry Confederation (ITIC) - the representative body of the Irish tourism industry – welcomes the publication of the draft Regional Spatial and Economic Strategy and acknowledges the depth of valuable analysis and proposals it contains. The strategic framework is a valuable planning tool for the tourism sector and ITIC welcomes the opportunity to comment on the draft presented by the Northern and Western Regional Assembly for comment.

ITIC's membership of almost 30 representative organisations covering all sectors of the travel and hospitality industry, including accommodation, food & beverage, transport, ports, visitor attractions and entertainment, are dependent on a supportive forward planning framework at national and regional level to inform and facilitate continued investment and economic activity in the tourism sector.

A tourism perspective

Tourism is Ireland largest indigenous industry with an estimated value in excess of €9 billion in 2018. The industry has shown remarkable resilience with sustained growth in recent years. Tourism currently supports in excess of 270,000 jobs in the economy while providing employment in many areas of the country with limited job opportunities. Not only does tourism sustain local communities and social networks, particularly in rural areas, throughout the state but also supports the presentation of our natural, cultural and artistic heritage.

Tourism: An industry's Strategy for growth to 2025, devised and developed by business, published by ITIC in 2018, sets out ambitious goals and objectives for inbound tourism that can lead to higher revenues, more jobs and greater exchequer receipts. The plan, devised by business and facilitated by Government, provides a road map for the development of tourism over the next 6 years.

Implementation of the plan's recommended programme of strategic and tactical actions is currently underway, in cooperation with the state agencies and other facilitators. Monitoring and progress reports from ITIC are published at six monthly intervals.

While the immediate outlook for continued tourism growth is positive it is not without its challenges. A key challenge is ensuring that Ireland's tourism offering continues to competitively meet the needs of the market – a market which is becoming more diversified, more demanding and seeking more authentic experiences. A focus on product innovation and differentiation, environmental sustainability, quality service and value for money have been identified as critical to securing a successful future for the industry.

The current tourism profile of the Northern and Western Regional Assembly's area shows a wide divergence in terms of development and relative economic importance. There is a marked contrast between the well-developed tourism infrastructure, attractions and services of the Galway sub-region and the, as yet, relatively undeveloped tourism infrastructure of Monaghan/Cavan area.

The launch of the Wild Atlantic Way has benefitted tourism within the NW Region and demonstrates the potential return on clear developmental strategies and branding. More recently, Ireland's Hidden Heartland brand should help to address the imbalance within the region. Existing destinations and attractors within the region are likely to continue to attract investment and increasing tourism volumes and revenues, in absolute and relative terms. However, the opportunity exists for under developed areas to improve their share of tourism visits and expenditure.

Success in boosting demand across the region outside of the current 'tourism honey pots' will depend on providing 'reasons to visit' so that the areas can compete for an increased share of both overseas and domestic tourists. Innovation in the sector will be key to driving demand and boosting the local economy. The current profile of the broader region is eminently conducive to exploiting the potential of the natural environment and cultural heritage to attract more visitors. However, there are a number of current weaknesses in the region's tourism infrastructure, including transport access and connectivity, visitor attractions of scale and of, at least, regional significance, accommodation options, themed trails, interpretation of the area's rich history, natural environment and culture. The broadening of the appeal of destinations, attractors and experiences within the region will be necessary to cater to the diversification of source market demand and to attract an increasing share of inbound tourists from overseas, including new emerging source markets.

Some specific comments on the Draft

The recognition of tourism as of top importance to the region in terms of economic sustainability is welcomed and endorsed by ITIC. The evidence of thriving entrepreneurship within the sector points to the potential to expand, provided the right strategies are pursued. Clarity of strategic objectives is vital to ensure continued investment by tourism and hospitality businesses.

The growth strategy, focused on the 6 defined sub-regions broadly reflects the spatial and economic classification of tourism intensity and developmental potential. Strategic development as outlined in the draft is welcome in outlining specific priorities and a differentiated approach in each sub-region focusing on the relative strength of the appeal and attractors in each.

The Atlantic Economic Corridor (AEC) is a valuable strategic framework, appropriate to tourism and the potential to expand visitor flows. Furthermore, the cross-border dimension represents a distinct tourism advantage and strategically fits well with the all island cohesion within the sector, marketed by Tourism Ireland.

The identification of Galway, Letterkenny, Sligo and Athlone as strategic focal points works well for tourism, as key visitor gateways and service hubs. Each possesses a distinctive set of appeals and attractions together with the necessary infrastructure as the foundation for future strategic development. In addition, the tourism role and potential of secondary tourism hubs – including Donegal Town, Ballina, Westport, and Clifden – is recognised.

The less developed areas of the region – Monaghan/Cavan and parts of counties Mayo, Leitrim and Donegal - require specific strategies to grow tourism which in many instances will be authentic small scale rural tourism experiences. The role of sensitive adaptation of natural assets, including those under the auspices of the National Park and Wildlife Service, should be based on best international practice. The tourism potential of off-shore islands would benefit from carrying capacity based development strategies, as islands have an intrinsic high visitor appeal.

The settlement strategy would appear to provide the necessary community and human resource requirements to sustain an expanded tourism sector in line with the national aspiration and goals for sustainable tourism growth.

The economic strategy is perhaps the dimension of greatest interest to tourism businesses. Competiveness has been identified as the key to continued success for Ireland's tourism. The strategic goals of place-making and clustering are especially relevant to tourism development. An economic environment of smart specialisation and orderly growth are also important business environmental factors which will help to shape a more competitive tourism sector within the region.

As previously mentioned, the natural environment is a regional characteristic and an asset of much of the region which has the potential to attract visitors to many parts as yet relatively undiscovered in tourism terms. The continued expansion of Galway as a popular tourism destination requires a particular set of strategies to address environment challenges to ensure that the quality of life for residents is not diluted by continuous growth. From a tourism perspective, especially as environmental awareness and its value grows internationally, the quality a destination's environment has become a key component of attractiveness and competitiveness. The management of the city's range of environmental factors will be a critical factor in maintaining competitiveness and avoiding the risk of 'over tourism'.

Road infrastructure and transport connectivity is a 'sine qua non' for the development of tourism and ITIC supports the analysis based proposed strategies to improve the current shortcomings. Access, from within the state and cross-border, is a primary determinant of tourism flows, based on adequate infrastructure capacity and tourism friendly transport services – bus, rail, rural transport, and island ferries. The region has the benefit of direct access from overseas, primarily from Britain, through airports at Knock, Carrickfinn and Derry, together with air services at the main airports at Dublin, Shannon and Belfast. A strategy of development of economically viable air services directly into the region, particularly from mainland Europe, would boost tourism.

A focus on broadband together with 'smart region' and 'smart government' strategies would ensure that the region is not competitively disadvantaged and improve business efficiency and productivity within the sector.

While the strategy outlined represents a positive enabling step to guiding the future tourism development within the region, a major concern for the sector would centre on the structures and processes to ensure a cohesive and integrated implementation. The public sector architecture involving government departments, regional assemblies, local authorities and state agencies presents a particular challenge in delivering an effective, efficient and integrated implementation programmes. From the tourism industry's perspective clarity on strategies, decision making and implementation are essential for investment confidence and good decision-making by businesses engaged in tourism. ITIC would welcome greater clarity on roles and responsibilities, a transparent process in taking the strategy forward, together with public monitoring of implementation programmes.

ITIC is more than willing to assist the Regional Assembly in its work on finalising the strategy.