

Title (1): Whose place is it anyway?

I'm going to start off this evening by making the point that I am not here to criticize the tourism industry; far from it, I'm a huge fan, what I do want though, is to get people across a range of sectors to think critically about it, its impacts and the justification for its development. The tourism industry is in full on **'grouphink' (2)** mode, its almost heretical to question any statement about how valuable it is to our economy and to job creation, how it's a soft industry with almost no negative impacts, and that it is an indigenous industry that cannot be moved offshore, but the fact of the matter is all of these statements are open to question, and in many instances they are patently untrue. **Ring of Kerry Story**

Tourism is an extractive industry, with as bad or worse consequences at community level as any of the other extractive industries, and we should treat it with the same degree of wariness, and while that may sound **radical (3)**, its an opinion that's been around for a while...as you can see from this definition of the tourism industry that doesn't often see the light of day; it's from Sir Colin Marshall, former chair of British Airways, at the launch of WTTA in 1994. And despite all the emphasis on eco and sustainable tourism development over the intervening 24 years, little has changed. Tourism collects the rent whilst rarely contributing to maintaining the asset. But, that asset, the destination within which tourism occurs, and the host community who live there, are the single most important asset the tourism industry has. **So, if (4)** we want to have a sustainable tourism industry, it is utterly predicated on creating, developing and maintaining a sustainable tourism destination and that will only happen if it is a co-created enterprise between the local community, its environment, the industry and visitors. **Pretty obvious (4a)** really...

We just have to make three small **changes (5)...** the Model of destination development, the Metrics we use to determine its success and the Marketing strategies we use to deliver it. See.....easy!

I'm going to talk about how a **small community (6)** from Ireland, a place called the Loop Head Peninsula in County Clare achieved these three changes. In 2009 I co-founded a community based destination management organisation **called LHT (7)** whose core message was that **we** would be in control of **our** tourism development. The LHT story has been about a community looking into the future and not liking what it saw, daring to think differently, looking at what it had, how it could be used and then going out to sell it to the market it wanted.

Today's talk is broken into four sections...

- **Firstly (8)**, I'm going to start with describing the Loop Head Peninsula, I will explain about LHT, how we set it up, why, the things we did that really worked and the success we have had.
- **Then (8a)** 'm going to talk about the industry; some facts and figures, how we should rethink what defines a successful industry in the face of such a huge increase in the numbers of international tourists. The importance of marketing and who does it and the consequences of getting it wrong.
- **Close (8c)** with a little word about how we might begin do things a little differently. What sort of questions the communities and the industry should be asking to ensure it works for all sides.

Part 1.

The **Loop Head Peninsula (9)** is a triangle of land sticking out into the Atlantic Ocean, almost completely surrounded by protected areas, its 140km square with approx. 3500 people living there, apporixmately 10% of the size of the Lofoten Islands...**mid (10)** way along the West of Ireland, on the Wild Atlantic Way, a 2500km long coastal tourism route, the longest in the world.

Loop Head Tourism (11) is a completely voluntary organisation, three parishes working together, which is pretty groundbreaking stuff in itself. We have a committee of 9 drawn from the development organisations of the three **parishes (12)**, 3 from each regardless of population size, businesses numbers or political power to ensure buy in from all sides.

Our economy predominantly relies on farming, although this is becoming less prevalent...and our single biggest export for over 150 years has been our **people (13)**, particularly our young people.

Very isolated, at least 40 miles from the major transport hubs and medical facilities, and with low broadband speeds, it is classified as one of the more marginalized communities in Clare. And economic development opportunities are very limited...

On a more (14) positive note the peninsula is surrounded by some of the most spectacular scenery on the west of Ireland, much of it classified as a protected and fragile environment. Our **Low (14a) population density** gives a strong sense of solitude and wilderness and with an unparalleled cultural and heritage product it is easy to see why tourism could be seen as the most realistic option left for economic development on the peninsula. I found great similarities with here, in particular ...when I had the opportunity to visit yesterday and Monday.

But how do you make sure that tourism does actually deliver for us, the community within which it is taking place, how do we make sure that we don't end just being the place where tourism happens and the monetary transaction takes place many miles away... We had to radically rethink our perception of tourism and the way it works we started to question and challenge many of the assumptions made by and about the industry.

So here is the fundamental shift in thinking that differentiates the Loop Head Peninsula development model from most other destinations. **We (15)** understood from the outset that tourism itself, was not the goal, **rather it is (15 a)** just a tool, one if used properly could deliver economic sustainability for our coastal community and two of the most efficient ways we have of using this **tool (16)** is to;

1. maximise linkages between businesses and
2. **minimise (16a)** leakage from our local economy

Maximising **linkages (17)** is a fancy term for getting people to work together, creating a network... getting local operators to stop thinking of each other as the competition, for instance, we must stop thinking the other restaurant across the road is the competition and to start working **with** that restaurant to turn the town into a foodie destination.

We had to build up trust between them, in the world of corporate speak...we had to do some team building.

I'm a fan of project-based co-creation, large or small, it doesn't matter, to get traction on the ground with business people, things can not be a theoretical exercise ...**so we went out (18)** and found a project, the EDEN award, a pan-European sustainable tourism competition that rewards emerging, little known

destinations who are committed to the social, cultural and environmental sustainability of the destination. The theme in 2010 was 'Aquatic tourism', we took a small group of competitive operators with common interests on a tightly focussed project and we won it.

The win was great... it showed us we had something really worthwhile, but the real benefit came from actually having to work together, showing that competing businesses need not be competing with each other, and having to trust each other to do what we said we would.

Another example (19) of how we build linkages is our 'Bootleggers Ball';

A local hotel gives us their building for the night, all the local food circle chefs cook the food, others do front of house...the Stella Maris Hotel becomes our business for the night

It provides us with a brilliant night out and raises approx. €50,000 Nok for our marketing fund, but the key result here is again, competing businesses all working together, and being seen to be working together.... helping each other to reach a common goal...and building trust in each other to get things done. That word again, "Trust". Example, restaurants in Kilkee now **close on a rota.**

This was all good...and built up strong linkages between business operators and the communities...the three parishes were now working together to create a single destination and a brand.

But what about the second part (20).... addressing the leakage from the local economy... what does that even mean.... so, lets use this image of a leaky bucket to represent the economy of the Lofoten Islands. Our objective is to fill up the bucket with money from tourism activities. **The (20a)** water flowing in is the tourism income stream, but the bucket has a lot of little **holes (20b)** in it, the

money each business spends outside the destination... the raw goods, services and wages that is the leakage, and, indeed it is also the difference between the money taken by operators based outside the destination and the proportion of that money they spend here with us... €40 versus €3. With all this water leaking out, how do we fill up the bucket...?

1. Standard tourism development strategies, mostly marketing driven, tend to focus on finding more and more taps, to keep pouring water in faster than it leaks out...wasteful, inefficient, expensive

2. or, you could look at it differently as we did and focus on blocking up the holes, doing the community development work, by encouraging businesses to look at retaining their purchasing and wages within the locality, i mean, if we are using tourism as a tool to deliver economic sustainability for our community, why bother developing an industry that attracts customers into the area if the local business operators just send the money straight back out the road. One could also prioritize access to those operators who could deliver the highest local benefit instead of those simply delivering the highest volume of traffic.

Blocking those leaks means we need less tourists to deliver more benefit to the local economy which in turn means we can afford to be a little more picky about what kind, how many and where we want them to go. Lower levels of visitors need lower levels of resources, and a local tourism industry that is much more sustainable, easier manage, lighter on the landscape, has less negative consequences on the local community and more cost effective to develop. Our total spend in 7 years has been approximately €1.2 M Nok. I think in actual straight advertising or direct marketing we probably have spent less than €100,000 Nok. **(EAV (21) for Best Place to Holiday in Ireland was 2.5 million Nok.)**

So, what tools did we use to trap as much of this visitor income as possible?

Food (22) is one really good example of where we can reduce the leakage of the tourist euro from our **economy (22a)**, it's a hugely important part of the visitor experience and a great way of creating a link between the visitor, the producer and the place, adding value locally and creating an authentic experience at the same time. The **Loop Head Food Circle (23)** designed this simple mechanism to make that link.... putting a lighthouse symbol on their menus beside locally produced food. It has increased sales to local producers by over €150k and created 10 jobs in just over a year.... reducing the leakage from the area...and as importantly, directly linking the visitors food experience to the place.

Another thing (24) we can do is to start thinking strategically about the downstream affects of a development or attraction. A destination needs to understand why it needs tourism, develop a clear vision for the future, and make decisions based on that vision. The Loop Head Lighthouse development began just after the EDEN win in 2010. The lead developers asked us on board as partners, we had our concerns, such as potentially turning an isolated local beauty spot into a mass tourism product.

So...we insisted from the outset that there would be no craft shop or café at the lighthouse, pretty radical...a visitor attraction without a café or souvenir shop! Why, well the first question we asked is... What is the role of the lighthouse, who benefits from this facility...is it there to deliver large volumes of visitors, or was it about adding value for the local economy. For us, and our perception of tourism as a tool, it was about the latter, delivering visitors to local business, creating local jobs and a vibrant community... At the time there was a local pub at the

bottom of the hill 3 miles away dying on its feet...it now opens full time from March to Oct with 10 staff, all local.

Two local (25) women opened a craft shop and gallery a mile from the lighthouse. It was the first bricks and mortar business opened in the village of Kilbaha in over 100 years, they employ 3 local young people and they have just gone global with their ecommerce site, I told them I was using them as an example, and they said to tell you all they ship worldwide... they also have 5 kids in the local school.

And the reward for all this working for each other, we have created the atmosphere which has encouraged the development of micro **enterprises (26)**, we now have a network of 40 or so locally owned and operated businesses who each pay a yearly fee of €240 and all see each other as allies.

If I was modest I would say we have been reasonably successful, but in not...**(26a) we have** been really successfull...well beyond our wildest dreams really. Not bad for a small triangle of land 140km square with only 3,500 residents.

15 mins

Part 2. So, this is the section where we look at some tourism facts and figures and think about them critically. On the face of it, the tourism industry has the capacity to deliver huge **local benefits (27)**, maybe even cook our dinner, indeed from the UNWTO down to local authorities we hear a lot about how tourism is a great distribution mechanism for transferring wealth to less financially well off regions. This claim is used to justify public investment in the development of tourism infrastructure and marketing, I'm not sure though it can stand up to too much scrutiny. **The trouble (27a)** with fire though is if its not

managed properly, it can also burn your house down, too many times, others are burning down our houses to cook their dinner, and then asking us to clean up after them, do the dishes, take out the rubbish and repair the damage. But is there any proof of this? Let's look at a couple of examples and you can make up your own minds.

Start with these **two images (28)**, one comes from Failte Ireland, our national tourism development agency, showing the areas with the most tourism activity in the country. **The second (28a)** comes from the Irish Tourism Industry Confederation and shows overseas visitor spend by region. Look at the growth the industry is delivering to Dublin, the capital city, up 5%, compared to the South West, very heavily trafficked, but with a declining share of the spend, down 4%, a 9% swing in two years, while every other region has seen zero growth...but, we are assured, the benefits will **trickle down (29)**, the trouble with the trickle down theory is that it is supposed to work like this, but I have found it almost always works like **this instead (29a)**.

Addressing this is far from easy, our biggest challenges were, and largely still are, to convince relevant authorities, and indeed many within the community too, that we have to measure tourism in a different way...large numbers of visitors is no guarantee that the local economy is benefitting. But to get traction on this we would need to find some figures to back up our argument.

This is (30) my home county of Clare, situated halfway along the west coast of Ireland, when we talk of Irish tourism destinations Clare is considered to be a superstar. It's the **spiritual(31)** 'home of traditional Irish music' and it has two of the top 20 fee paying tourist attraction in Ireland at the heart of its tourism offering, **Bunratty Castle (32)** and Folk Park and the Cliffs of Moher, one of the

most iconic tourist attractions in the world, with combined visitor numbers for 2017 of almost 2 million. Huge numbers, so no surprises then when a **report (33)** from the Irish Tourism Industry Confederation (ITIC) Clare was the 5th most visited county in Ireland and **it had (34)** the 6th highest spend attributed to overseas visitors. Sounds great...Yea?

But when we choose to look past these headline figures, and interpret them a bit more robustly, and look at the **value (35)** of each one of those tourists to Clare, we are actually ranked 24th out of 26 counties for average spend per visitor. Why is this? It ultimately boils down to the type of tourism we have developed in Clare over the last 30 years or so, chasing volume instead of value. Not measuring the right things!

Hold on though, maybe I'm too quick to judge, maybe these incredible tourism assets are being used to drive investment into tourism businesses that are delivering strong local economic benefit, well actually, no not really, how do I know that... well, two reasons really...

Firstly, the accommodation sector is one of the biggest tourism drivers of the local economy, the World Bank estimate there are 1.5 -3 jobs per hotel bedroom. Yet, according to FI, Clare has one of the lowest **accommodation (36)** bases on the entire west coast with less than half of what our two nearest neighbors have, a shortfall of 2,376 rooms on one side and 3,068 on the other. So no, it's pretty obvious; these incredible natural assets are not being used in such a way to drive inward investment to tourism businesses that could deliver local economic benefit for the county. We are not using tourism; it is using us.

And secondly, if we look at the socio-economic indicators of the places where this incredible level of tourism is taking place, we should see healthy, wealthy communities, right?

The WAW (37) is a 2500km long international award winning coastal tourism route, it basically hugs the west coast of Ireland. Millions of visitors pass along this route every year and on its way **through (38)**, Clare it travels through 31 Electoral Districts, these are the smallest geographical area used for assessing official social and economic data.

Between **2011 (39)** and 2016, we have seen historic growth in our tourism figures, a national increase of almost 2.5 million overseas visitors and a jump of €2.7bn in total tourism revenue, FI revenue estimates for the WAW are €2.8B, I think that's 28Bn NOK if my maths is correct, into the local economies it passes through, which sounds great, but again, the devil is in the detail. Over the **same period (40)** in Clare, of those 31 EDS, only 3 improved their status from disadvantaged to marginally above, and the unemployment rate along the route was double the 2016 national figures. . So, again, it seems tourism isn't quite delivering against its claims of spreading wealth out to the regions.

Im going to look at a specific sector, one that is a very heavy user of our tourism assets and public infrastructure, and is often the laymans metric for success, and measure what benefits they leave the communities, in 2014 **there was (41)** a great study done on the local impacts and consequences of coach traffic to and from the Cliffs of Moher. **That year (42)**, there were an estimated 21,152 bus trips to and within the Burren carrying approximately 571,000 persons. Coach traffic accounts for approx. 50% of the visitor numbers to the COM. In 2014, 175k of these were day trips from Galway, Dublin, with an average spend of €8

or 80NOK per person when you strip out attraction entry fees. In 2017 the figures for day trip coach tours to the COM is in excess of 300k.

Those same **Coaches (43)** made over 20,000 stops to free sites in the landscape, putting 600,000 people into a highly sensitive and protected environment with no regulation, and low financial return to the area or indeed none to the local authority and state conservation agencies that have to mitigate or remediate any issues.

Meanwhile (44) this is what the local community are suffering on a daily basis, for that €8 and we are starting to see negative reaction locally

I believe these figures provide clear evidence that the focus on traditional tourism industry metrics, such as visitor arrival numbers or national revenue figures, are no longer appropriate, we have to **measure tourism (45)** in a radically different way, by how effective it is in creating benefits to the destination, prosperity, employment, vibrant communities and a healthy environment. I also believe it proves very clearly that unless one plans for tourism to be a local economic driver, and is insistent about making it happening, it won't.

The (46) definition of insanity is doing the same thing over and over again and expecting a different result, I am here showing you these facts and figures so you as a community can elect to do what we in LHT have done, something radical, like questioning standard tourism development models, be bold, find out how much benefit will be delivered locally, take on more responsibility, take control and lead the development, use tourism instead of allowing it to use you. **Hotel story.**

State and municipal agencies, policymakers, the industry and development agencies in turn needs to facilitate this, it will create better, more sustainable and more valuable destinations for the future of the industry.

And if we are serious about this, we need to rip up the rulebook and start over with different thinking, and one of the most important things we did was to rethink the management of the story of our destination.

There are (47) millions of words on Google about how local communities have to be involved in local decision-making about any development that will affect where they live, And this is only right and proper, but the really important missing piece in this puzzle is that these host communities have no right to be consulted as to the **story being told about** their place, or of who is telling it.

There is a glaring design fault in the current model, a disconnect between destination marketing and destination **management(48)**, those who manage the story do not have to manage the destination.

Some examples from around the **world, include (49)** Pulpit Rock in Norway, here is what the marketing of it would have you expect, **and this (49a)** is what the managers on the ground have to actually cope with.

Venice (50), it's a doctoral case study on its own, but again, this is how it is sold by industry marketing departments, and **this is (50a)** what the consequences of that marketing looks like on the ground, what the local communities have to live with and manage on a day to day basis.

We have (51) our own issues in Ireland, last year, The Skellig Ring was listed in Lonely Planets 'Best in Travel 2017" **and this (51a)** was the marketing strategy devised for it.

Exposure to millions on social media... through media contacts and trade fairs

The Skellig Ring is about 18km long, and about 15 feet wide.....

What are the consequences of selling it like this to so many people, it remains to be seen, and who will be managing it? Not the marketeers.

Screen Tourism is a particularly acute example of how marketing without thinking through the consequences can deliver untold negative impacts on

the location. **Game of Thrones (52)**, the Dark Hedges in Northern Ireland

Before **and After (52a)**

Mama Mia (53) and Greek island where it was filmed

Mission Impossible (54) and Pulpit Rock, 'cos with 250,000 visitors it needs more publicity

The Star Wars (55) movie was filmed along parts of west of Ireland and has been the basis of phenomenal global marketing campaign for the places in Kerry and Donegal where they filmed, and by their own metrics for success it has been incredibly successful, millions of 'likes', 'shares' and 'impressions' awarded after award for the campaign...the trouble is, **this (55a)** is the consequence on the ground. A different set of metrics, social and environmental ones for instance, might tell you it is a disaster. Maybe we need to demand the costs of managing the impacts of a marketing campaign at destination level should be taken out of the marketing departments budget.... Reining in..? Would that focus the minds of the marketeers..?

Star Wars also filmed at **Loop Head (56)**, but we insisted that we would not feature in the international tourism marketing of Ireland using Star Wars, because we felt there was a consequence to it, that went against our tourism planning, our vision. To be fair, we were listened to, and we explored other marketing angles with them, the result, was inclusion in a number of

international guidebooks (57) that had never featured us before and whose readers are at the top of our target market.

The trouble is, marketers are using local areas to market the national product in an international marketplace without considering the results, they are also using metrics for success that have long term consequences, not necessarily in the best interests of host communities and in many places is threatening the social fabric of those host communities, creating localized capacity issues and negative environmental impacts, this is Borocay Island **(58)**, and you know what, in the long term, delivering poor visitor experiences, and ultimately undermining the sustainability of the tourism product. **Borocay Island (58a)** has just been closed for 6 months; the costs are running into the millions, not a sustainable destination, not a sustainable industry.

The solution is to radically rethink our tourism development strategies, we need to focus on creating sustainable destinations and we can only do that by putting the host communities at the very centre of the process, we need to re-evaluate the worth of what is we have, how it is sold, who is selling it and to whom they are doing so. Do I think the industry will affect this change? No! It is addicted to the status quo. ? I had an interesting conversation recently with a woman called **Loren Rutherford (59)**; a tourism professional from New Zealand. She said she was very disappointed to find that *“the job market for development focused tourism professionals is lacking and companies remain far more interested in her marketing background”*.

And there you have it ladies and gentlemen, neatly encapsulated in two lines, the reason I believe we have overtourism, selling the place is more important than developing it,

Change will have to come from our communities and from local or regional authorities who need to focus on those **three things (60)** I spoke about earlier if we want to have a sustainable tourism industry.

MODEL (61)

Switching from a marketing led model to a community development led model. This model requires thought, community consultation, community buy in and planning. Its slow, it requires lots of capacity building and development work to empower our communities so they can do this for themselves, **to give them (61a)** that ability to determine their own desirable ends and the ability to achieve them. And while this may be uncomfortable to hear for some, this model requires us to switch much of our budgets from marketing to support the development work required to deliver it. The reward though is ultimately a tourism destination that is much more sustainable, more cost effective and easier to manage

METRICS (62)

We are not measuring what matters at host community level. We need to move away from measuring tourism by volume and at a national scale, and create a new set of metrics at local level to show how effective, or not, tourism is in creating local prosperity, local employment, a healthy local environment and local benefits for the host community within which it occurs, because that's where the negative impacts are felt. And I would add the host communities should have a significant say in what these metrics are. Each community may be very different.

MARKETING (63)

We need to change how destinations are sold abroad, we have spent many years using imagery of the same three or four iconic locations to sell the national product, and then we are surprised when they are struggling to cope with the numbers. Shifting to a more responsible marketing and understanding there are consequences, and what they may be, to how a place is marketed is as much if not more a solution to capacity issues than many other things being done. But if we are to begin this work, is there a learning from the work of LHT, a methodology other communities can use? How do you make it happen **for** you, instead of letting it happen **to** you?

(18 m)

Part 3:

In the 1950s a guy called Taiichi Ohno devised the famous Toyota Production System. In one of his best **known quotes (64)** he said we should “ask ‘why’ 5 times about every matter” to get to the root cause of a problem.

He used the example of a welding robot breaking down to demonstrate the usefulness of his method;

1. **"Why (65) did the robot stop?"**The circuit has overloaded, causing a fuse to blow.
2. **(65a)** There was insufficient lubrication on the bearings, so they locked up.
3. **(65b)** "The oil pump on the robot is not circulating sufficient oil.
4. **(65c)** The pump intake is clogged with metal shavings.
5. **(65d)** Because there is no filter on the pump.

My experience working with Loop Head and others has led me to believe the converse is also true, that if we undertake a similar process with the host community **before** we begin any tourism development, we can plan out an industry that will avoid problems occurring in the future.

I call it "**Persistent Enquiry (66)**". It **builds up (66a)** the layers of information for a community so they get a solid understanding of how tourism can deliver the maximum benefit for them. **Persistent enquiry (66b)** can design out the potential flaws and create a sustainable destination.

The first question many communities **ask is (67),...**How can we get more tourists? indeed many local and regional development agencies ask the same question and the operators on Loop Head were no different...but this is the wrong question to start with. We need to start with a **different one (68)**.... Why do we need them? The answer to this provides a purpose for tourism. It defines what kind of tool it will be.

We then need to work our way through the **other 4 (69)**

- What
- Where & When
- Who
- How

This is not a linear process, but the first one, why, is probably the most important; It essentially creates the 'vision' statement for the destination.

1. **Why** do you want tourism?

For some it may be about providing funds to aid conservation programs, for others like us **(70)** on Loop Head, it was about replacing our fishing and farming industries as economic drivers for the area.... It could be

about raising awareness or driving investment in local amenities or support industries...it will be different for everyone but getting the answers to the question 'why' will define a role for it within that community.

2. **The (71)** next question we ask is; **what** have we got that tourists might want to visit? We do not ask this question the other way round, so we are not asking what we need to build or do to attract tourists, otherwise **we hand (71a)** control over to external agencies and their agendas. This is a brainstorming, stock taking exercise; break it into natural/environmental assets, heritage, social and cultural. We could also ask other questions here, for instance;
What would (72) success look like? The answers gives us a goal, and something to make decisions against, whenever we are faced with an option, say an agency wanted to open an attraction, or a marketing opportunity arises, now, we can ask ourselves, if we agree to this, will it deliver against our goal of providing local economic benefit.

The next two questions are linked and should be done together.

3. **Where & When (73):** where and when does the community agree is appropriate for tourists to visit.... where and when does the community agree is off limits? This discussion allows for mutual understanding across a range of sectors, farming and tourism for instance, within the community about what is important for them and why it is, highlighting potential areas of conflict in the future and avoiding them. Weddings and funerals for example, are probably the most authentic local experience you can experience, but is it appropriate to market them? Weddings

possibly, but funerals are a bit harder to schedule...Once these lines are crossed or become blurred and the wider community feels the perceived costs of tourism exceed the perceived benefits, **we start (73a)** to see conflict and anti-tourism sentiment, and it becomes much harder to get things done.

4. Who: (74)

We need to consider 'who' in a couple of ways.

So, **firstly, who (74a)** is here at these discussions, who should be here and isn't, and why are they not? This is a planning exercise and the more knowledge we have about those who have the potential to create opportunities, and problems, for us in the future, the greater the likelihood we have of being successful. We can see potential problems, and avoid the minefields before we blunder into them. We can begin to empathise with their perspective, and alternatively, maybe they will begin to empathise with us and we can create solutions together. We may also gain some knowledge of positive potential, people may not understand the value of the assets they control or how they could be used for their own or community benefit and if they are not at the table nobody ever will.

Secondly (75), who is our target market? It probably comes as no surprise, but I prefer to ask this a little **differently (76)** who do you want to invite to your home? Much like family, we all have those relatives we love to see, and some, not so much...if we ask ourselves why, its probably got a lot to do with whether they fit in with us or not. One key point that tends to get forgotten in all the tourism development talk is its not just a destination, its actually your home..!

Failte Ireland have a really clear market segmentation process **undertaken(76a)**, a breakdown of peoples reasons for going on holidays, and wishes and desires when they are on holidays. We have the 'Culturally Curious', 'Great Escapers' and 'Social Energisers'. On Loop Head, we focussed in the 'culturally curious' and "the great escapers' and in particular the German, Dutch and UK market. They want quiet unspoiled places and are prepared to pay above the odds for it, they are light on our landscape because that is what they treasure, so they won't damage it, actually we find they are prepared to help protect it, they want to delve a little deeper and learn more about our culture, are prepared to pay more and stay longer because they know that's what they need to do to experience it.

5. **How:**

Now, at (77) last, we can ask the question; how do we get more tourists? Because now you know exactly what you have, who it is you want to attract, what you want them to see and do etc, it's a very targeted question, its not a general one at all, you can begin to look at who in the marketplace is trading in the commodity you as a community want. We asked for a list of tour operators who specialised in our chosen segments in our target market countries, researched them, filtered them and connected with them. **We attended (78)** trade shows with the specific purposes of meeting the niche tour operators we wanted to work with, sometimes success for us was meeting two tour operators.

This process is a really important exercise across all facets of the tourism supply chain.

For communities, this is the type of basic building blocks of information for community led destination development, it creates the sort of knowledge and trust I spoke about earlier on Loop Head, it shows very clearly where the strengths, weaknesses, opportunities and threats are within the community from a tourism perspective. I believe it should be funded by the industry and our development agencies if they want to ensure a quality, sustainable tourism product. The return on their investment in the form of product development would be a more responsibly managed, better quality, more valuable and more sustainable destination.

Closing:

(79) I will finish with a quote I would like you to think about when you are sitting at home reflecting on what you have heard today.

“People are slowly waking up to the fact we are not going to run out of tourists.... it is environmentally sound and attractive destinations.... that are becoming scarce. People will not stop moving around the globe, but they will do it more selectively”

The property developer Tony Goldman made this statement in 2012 in the book, “Last Chance Destinations”. He **wasn't wrong (80)**, in 2012 globally, the UNWTO welcomed 1 billion tourists, by 2017 that number is 1.34 billion; in Europe those numbers are 534 million in 2012 and 671 million in 2017. In Ireland over the same period, we have gone from 6.2 million in 2012 to 9 million in 2017. The COM in 2012 was 860,000 in 2017 we have 1.5m.

So folks, really... tourism isn't going away.... I promise.... We are facing a tidal wave of them, and in the face of that fact we need to re-evaluate what is we have and to whom and how we sell it.

Tourism is too precious a local community asset to allow it to be sold to the lowest bidder; in many instances the only asset many coastal communities have left is their natural and built heritage. They have been stripped of all other opportunities, and if we truly want tourism to be a mechanism of change to our rural communities, we have to ensure they are right at the heart of **the discussion (81)** as to the value of this asset, and how tourism to it can be managed by them and for them, and for their place.

Building networks, capacity building communities, undertaking workshops that question the reasons behind tourism development helps communities discover what it is they have, what they are happy to sell, to whom and when it is appropriate. But I will warn you, it is a slow process, focusing on long term goals rather than on short-term gains, but as with pretty much everything in life, anything worth doing requires patience to do it correctly. A 10-year strategy should be an absolute minimum.

Sustainable destinations don't just appear, they can't be created by the tourism industry marketing departments, they have to be built, co-created with the communities who live there, instead of just treating them as commodities to be sold. **Effectively (82)** tourism operates under a social license from the host community, in the past this has been ignored, **but in (83)** the current climate, that is not a long term sustainable view, one only has to look at Venice, Mallorca, Amsterdam, Barcelona, Cornwall, the Isle of Skye, the Dingle Peninsula and the Philipinnes to see that. I believe we are looking at unfolding situations around

the world every day that point us towards the realization that we cannot keep doing what we have always done, otherwise we will just keep getting what we have always got.... the game has changed, we are sleep walking into a tsunami of tourism, and thinking like everyone else will not do anything to help us avoid the negative social, environmental and economic impacts when it hits. So it is no longer appropriate or sustainable for the industry to continue doing what it has done in the past and it would be irresponsible for local and regional government to allow them to do so. Smart destinations are getting out in front of this and planning for the future.

Tony Goldman spoke about tourists being more selective, the other side of that coin is that destinations can also be more selective, we do not need to be something for everyone, rather we can design, build and market to specific segments of the tourism market that best fit in with who we are, what we have and what we want and **need (84)** We need to be more confident in the value of our homes and recognize the worth of these quiet beautiful places in this crazy world where instant gratification is the norm. Yes, I believe there should be a higher price to pay to access these places, places like here and Loop Head; maybe they should be a once in a lifetime experience.

(12 min)