Service Sector Audit
Moyle District Council
November 2003

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Executive Summary

Moyle District Council, in acknowledging the potential that exists to expand the service sector within the district, appointed TEDI Sales and Marketing to carry out a comprehensive Service Sector Audit of the district to include the development of an Implementation Plan. The purpose of this Service Sector Audit and Implementation Plan was to develop a detailed profile of current private sector provision across the Moyle District area, identify gaps in this provision, and through research and analysis, to recommend strategies and initiatives that will support the growth and development of the sector.

This document provides information and research on the following:

- An outline of service provision in the Moyle district.
- An overview of national and international trends in the services sector.
- Reference to best practice case studies
- A series of detailed research surveys, including Consumer Research amongst local consumers and visitors to the district and a trade survey of the district's businesses.
- Recommendations on appropriate actions aimed to stimulate and accelerate the development of the service sector across the district are provided as well as an action plan to ensure positive actions are taken.

Since 1993, Moyle has experienced a 20% increase in the number of available jobs. Much of this job creation has arisen from opportunities within the district's construction and service sector, where the retail and hospitality sectors have seen employment growth of 56% and 40% respectively.

Over the past eight years, there has been a significant decline in public administration in Moyle, where employment has fallen from 210 people in 1993 to 152 in 2001.

This growth in hospitality services vis a vis a decline in public services is important since the focus should be on encouraging and fostering the sustained development of key growth sectors such as hospitality and retail as a means of countering the continuing decline in manufacturing, public administration and agriculture, at both a national, and local level.

The importance of Moyle's hospitality and tourism sector is illustrated by the fact that more than twice the number of people work in this sector than the Northern Ireland average. This sector does appear to offer the greatest opportunity for future growth, and is an area which, if it does meet its full potential, could have a very positive knock-on effect to the area's retail sector.

The biggest single area of service sector employment is retail and wholesale trades, accounting for some 590 employees. The majority of this employment is centred on the district's principal towns of Ballycastle, Bushmills and Cushendall, all of which are traditional market towns that primarily service their local catchment populations. The research carried out has shown that these towns are used by local people primarily for grocery and convenience shopping, and that the area experiences high levels of leakage to the neighbouring provincial towns of Coleraine and Ballymena, particularly for clothing and general household goods.

In developing the Moyle Trade Directory on behalf of Moyle District Council, 582 service sector firms/providers were identified in the district.

In general, the Moyle area is relatively well provided for in terms of its local services, it has a wide range of natural and other visitor attractions, it has a good stock of accommodation, and its people are a key asset. It appears, however, that the key factor missing in the equation may be a lack of visitors staying in the area.

Regarding the various research surveys carried out in the area, key findings included:

- The two key reasons for coming to the area were to sight-see (44%) and simply to relax and enjoy the peace and quiet of the area (24%).

- Key advantages of the area were its peacefulness and tranquillity (68%), followed by the natural beauty and scenery (54%). Other key advantages cited included: friendliness of the people (26%), the fact that there was such a wide range of attractions within close proximity of each other (24%), and the character/feel of the area's towns (10%).

- less people were able to cite disadvantages of Moyle. One in five of those surveyed made the point that there was a lack of things to do at night. Others commented on the fact that: the area was "too far out of the way" (14%), "the public toilets were quite poor" (12%), and that "there was nothing to do in wet weather" (12%).

- Issues that tended to aggrieve local people - car parking and lack of big name shops, were mentioned by very few visitors to the area.

- Other answers worthy of mention included the fact that the towns could be tidied up or made to look more attractive (14%) or that a good restaurant was needed (12%).

Due to its small population base, the service sector in Moyle may not be able to flourish and grow further if it cannot access a wider range of service users. Apart from setting up/or attracting key business services that have the potential to export their services, the key method in developing the sector will be to draw service users into the area.

Bearing in mind that the district's retail sector primarily services a local population which is equally capable of going to surrounding areas to avail of a wider variety of goods and services, future retail growth is likely to be in retail outlets which complement the area's tourism sector, such as cafes/restaurants, craft shops and specialist food shops/delicatessens.

In plotting the way forward for Moyle's service sector, the approach outlined in this report is based upon a number of factors:

- The ability of key players, both in the public, private and voluntary sectors, to create an environment that is conducive to service sector growth.

- The building up of skills, resources and expertise, which will ensure that, when visitors do come to the area for the first time, that they are likely to return for repeat business, or just as importantly, likely to recommend the district to others.

But perhaps of most importance will be the ability of the district to actively market itself as a key tourist destination. This will be dependant, partly on the public sector to pump prime the process and create awareness of the district, but most importantly, it will depend on the private sector to come up with a range of quality, innovative ideas which attract people to the area to stay, and to return to their individual establishment, or groups of establishments, as the case may be.

In analysing this marketing issue, a place name survey was carried out by TEDI to gauge awareness of 12 place names in Northern Ireland. Of these 12 names, Moyle had the highest percentage (57%) of respondents who didn't recognise its name, or location. However, there was generally high levels of recognition for some of its towns and attractions (Ballycastle, The Glens, Bushmills Distillery and the Giants Causeway).

Bearing these facts in mind, the key challenge for Moyle, in terms of branding its promotions, is whether it should keep the word 'Moyle' and aim to increase the low levels of awareness that currently exist, or alternatively focus on its key attractions and towns, where awareness is already quite high.

A possible solution would lie in embracing a slogan such as 'Moyle – the Heart of the Causeway Coast and Glens' which would solve the two issues above and also re-enforce Moyle's position as the key asset in the wider council-led Causeway Coast and Glens Consortium.

Having looked at key motivational facts as to why people visit various regions within the British Isles, Moyle proved to be similar in many regards to places such as Cornwall, the Highlands and Ireland. Learning from these examples, Moyle needs to focus its efforts in ensuring that its Unique Selling Proposition – its people, is a match for its other great asset, its natural beauty.

In addition, if Moyle is to become a key tourism destination rather than just a stop off point for a few hours, there is a need to develop structured networks and formal collaboration between accommodation providers, activity providers and other complimentary enterprises (shops, restaurants, pubs, cafes, tourist attractions).

In response to these challenges, an action plan has been drawn up which sets out actions needed to grow and enhance the service sector offering in Moyle, whilst at the same time providing a forum for local service providers to manage this development process. Case studies are used throughout as a means of generating ideas and providing areas for debate.

Key activities to be carried out by this `Moyle on the Move` group include: the facilitation and co-ordination of the activities of all stakeholders in the development of Moyle's services sector, the implementation of a number of growth initiatives, the monitoring and control of initiatives and the generation of new ideas and actions.

Initiatives to be implemented as part of the action plan include: a Learning From Past Practice initiative, a Service Sector Support Programme, increased Investment in the Public Realm, a range of Joint Council/Traders/Community Initiatives and a Cultural and Creative Industries Initiative.

Research carried out as part of this project also found that those regions that can develop their rural tourism products within easy access to key tourist attractions and/or the seaside, are likely to have the greatest success. Such indicators point clearly to the potential that exists in Moyle to effectively co-ordinate and package its tourism, retail and entertainment offerings to appeal to a wider audience.

One of the area's touched upon in this report is the potential that exists to focus on the growth and development of the district's creative industries sector, which would serve as a means of not only developing and enhancing products which have a regional character (Bushmills Whiskey, traditional musical instruments, Yellow Man, etc.), but also enhancing the provision of culture based events, activities and entertainment for locals and visitors alike.

Introduction

1.1 Background

Moyle District Council, in acknowledging the potential that exists to expand the service sector within the district not only to the people of Moyle, but also to visitor trade and to other external markets, appointed TEDI Sales and Marketing to carry out a comprehensive Service Sector Audit of the district to include the development of an Implementation Plan.

1.2 Purpose

The purpose of this Service Sector Audit and Implementation Plan is to develop a detailed profile of current private sector provision across the Moyle District area, identify gaps in this provision, and through research and analysis at a local, regional and national level, to recommend strategies and initiatives that will support the growth and development of the sector.

1.3 Aims

The key aims of the audit were to:

- Analyse the entire private service sector within the District of Moyle, and quantifiably demonstrate, where appropriate, visible gaps in service provision to local people, the visitor trade and external markets and identify opportunities for expansion;
- Identify appropriate service sector development programmes that would build the capacity of local businesses and the local community to develop and implement service strategies during and beyond the life of the programme;
- Identify opportunities for employment within the service sector in the district, focusing on niche markets, the visitor trade, external markets and job creation;
- Deliver a comprehensive report outlining the results of the audit and recommendations for action;
- Produce an implementation plan outlining how all identified opportunities and potential should be executed, including timescales and appropriate costs.

1.4 The following document sets out to meet these aims, and is presented in a number of sections including:

- **An outline of services provision in the Moyle district.** In addition to this overview, a comprehensive listing of all service sector companies operating across the district has been carried out as part of the Moyle Trade Directory project and provides detailed baseline information on over 600 firms.
- **An overview of national and international trends** in service sector provision as a means of assessing what future directions the sector could develop within the Moyle district.
- Throughput the report, reference is made to **best practice case studies**, providing examples of how other regions have successfully developed local service sector initiatives or opportunities to provide added value for their local communities, businesses and visitors.

A series of detailed research surveys were also conducted to gain first hand feedback not only from service providers and other stakeholders in the district, but perhaps most importantly, from consumers themselves i.e. those people from within and outside the district that use the services on offer.

This consisted of:

Consumer Research

A key element of the consumer research was to find out what services local consumers use both inside, and outside the district, and to examine their motivations for doing so. In total, 130 people were interviewed in the towns of Ballycastle, Bushmills and Cushendall.

Similar face to face interviews were also carried out with 50 visitors to the district, to see what services they use/buy when in the Moyle district, to gather their views as to why they came and what they liked about the district and its services, and to identify what they felt is lacking in the district's current service sector offerings.

A Survey of the District's Business Sector

A postal survey was undertaken to provide a clear overview of the service providers in the district, analyse their needs, aspirations and where they believed gaps existed for the development of the sector. A total of 730 firms were sent a copy of the survey, and 45 responded, giving a response rate of just under 6%.

1.5 Recommendations and Action Plan

A key element of this study was the need to provide Moyle District Council with recommendations on appropriate strategies and initiatives that could help stimulate and accelerate the development of the service sector across the district.

Whilst it was envisaged that these recommendations would be focused on encouraging new business start-ups and the growth and development of existing businesses, the research carried out has shown that a variety of actions need to be taken in the district to create an environment that is conducive to the stimulation of a more enterprising and innovative services sector.

By taking into account the feedback from all of those people who were surveyed, and by identifying initiatives that have proven to be successful in other areas, a clear series of actions are set out which, if implemented in a planned, co-ordinated fashion and in true partnership by all relevant stake-holders in the district, should have a very positive impact on the development of the service in Moyle in the next 3-5 years.

It is also our belief that the key driver of this growth is not the local authority, but primarily those business people and firms that make up the district's tourism, hospitality and retail sectors. However, the local authority, and other key public and/or voluntary agencies, has a vital role in pump priming the whole process by assisting in the creation of this environment that is conducive to the stimulation of sustained renewal and growth in the district.

2.0 Understanding the Service Sector

2.1 Background to the Service Sector

In carrying out this Service Sector Audit, Moyle District Council has recognised the potential the service sector offers as a key source of economic growth and employment.

Prior to discussing the findings of the audit, this section provides a general overview of the service sector, how it is defined and how it has been developing over more recent years.

2.2 Definitions

The service sector is a diverse group of industries covering a broad range of market and non-market industries that include high technology, knowledge-intensive, labour-intensive and low-skill industries.

Simply defined, services are the result of labour that does not produce a tangible commodity.

The service sector, as defined by the Office for National Statistics, covers:

- the wholesale and retail trades
- hotels and restaurants
- transport and communications
- financial services
- real estate
- business services
- government
- other services

Distinguishing between services and manufacturing has become increasingly difficult as firms have outsourced service inputs and bundled services with goods. Although sub-contracting has long been a characteristic of manufacturing, the outsourcing of service inputs in the manufacturing process, such as computer support, transportation and secretarial assistance, is relatively new. This trend towards increased outsourcing of services is also reflected in the high level of job creation in other business service industries, for example advertising, credit reporting, photocopying and data processing.

2.3 Types of jobs in the Service Sector

The service industries employ a greater share of women than the economy as a whole, particularly in education and health. They also account for a disproportionately high share of part time employment, particularly in the hotels and restaurants sector. Hotels and restaurants also employ, on a part time basis, a high proportion of young people who tend to combine work with education.

The number of self-employed people working in services industries is below the average for the economy as a whole. However, some industries such as real estate, renting and business activities and other community, social and personal services have a high proportion of self-employment.

2.4 Trends and Developments

In general, services now typically account for about 70% of output in most industrial countries. At the same time, the share of employment and output in manufacturing and agriculture has declined.

The switch from manufacturing to services is not symptomatic of the failure of a country's manufacturing sector. Rather, the decline in employment in manufacturing is largely the consequence of the faster rate of productivity growth in manufacturing, combined with shifts in consumer demand towards services (for example entertainment and leisure, eating out and personal services) as incomes grow.

The growth and importance of services is therefore seen as the result of the process of successful economic development and rising living standards.

Nevertheless, this process of structural change in the economy will be more difficult if the service sector does not function effectively as a source of job creation.

Increasing Output and Employment in the Service Sector

The findings of a recent joint Anglo French study into the growth of output and employment in the service sector concluded that:

- Services are now the dominant source of job creation.
- ICT and knowledge-based services are becoming increasingly important sources of job creation.
- The service sector covers a diverse range of activities, some requiring high-skilled workers, but others predominantly low skilled.
- Service industries employ a greater share of women than the economy as a whole and account for a high share of part time employment.
- Average earnings in the service sector have consistently exceeded those of other sectors. However, the service sector consists of both very high and very low paid industries.
- The main employment generating service industry has been business services. Part of the increase in employment in business services has come about as manufacturers have out-sourced service activities previously managed in-house.
- It is difficult to accurately predict or determine the type of services that society will demand tomorrow. The future pattern of service sector employment will be the result of the interplay of technological developments, market forces and overall labour market policy.
- Government policies should reduce existing and anticipated barriers to growth and employment and, taking account of international best practice, create an environment that is conducive to the development of new service industries as they are created.

Since 1980, the service sector in the UK has generated a net increase of over 3.75 million jobs. The main employment-generating sector has been business services. A large part of this increase has come from advertising, marketing and consultancy services. Employment in business services has also increased as manufacturers have outsourced service type activities, which they previously managed in-house.

Other more dynamic employment providers include computer services, air transport, education, health and social work services, retail and financial auxiliaries. However, not all service industries have experienced employment growth. Public administration, defence, land and water transport have experienced negative employment growth over the last 15 years.

Forecasts suggest that labour demand in the service sector will continue to increase and it is generally acknowledged that improving employability is important, particularly amongst more disadvantaged groups. Whilst detailed recommendations on employability issues are beyond the scope of this study, if the service sector is to thrive and grow in areas like Moyle in the long-term, employment policies and initiatives should aim to raise awareness of job opportunities, increase human capital/skills, and increase effective job search.

2.5 An Overview of the Service Sector in Moyle

Service sector employment accounts for just over 2500 jobs in Moyle, which equates to 81% of total employment in the district (excluding agriculture).

In comparison to the Northern Ireland average, Moyle has a higher dependence on both public and private service sector employment (at ratios of 1.06 and 1.07)

Table One - Employees in Employment (ex Agriculture)

	Moyle		NI	Location Quotient*
Manufacturing	238	8%	15.4%	0.52
Construction	320	10%	5.5%	1.82
Services – Private Sector	1,420	45%	42.1%	1.07
Services – Public Sector	1,144	36%	34%	1.06
TOTAL	3,148			

Source: NI Census of Employment Sept 2001
*The Location Quotient provides a measure of the relative concentration of an industry in an area, compared to the region as a whole.

2.6 Employment Trends

Since 1993, Moyle has experienced a 20% increase in the number of available jobs. Much of this job creation has arisen from opportunities within the district's construction and service sector, where the retail and hospitality sectors have seen employment growth of 56% and 40% respectively. (See table below)

Table Two - Service Sector Employment Trends 1993-2001

	1993	1997	2001	Actual Change	% change
Manufacturing	277	301	238	-39	-14%
Construction	154	217	320	166	108%
Services					
Wholesale and Retail Trade	379	539	590	211	56%
Hotels & Restaurants	279	336	412	133	48%
Transport	68	67	146	78	115%
Financial	46	44	38	-8	-17%
Real Estate	30	42	75	33	110%
Public Admin	210	172	152	-58	-28%
Education	464	517	535	71	15%
Health & Social Work	525	509	457	-68	-13%
Other Services	155	111	159	4	3%
Services	2156	2337	2564	408	19%
Total inc confidential info	2633	2901	3148	515	20%

An interesting comparison is seen in the growth of the hospitality sector vis á vis the decline of public administration in Moyle over the past eight years.

In 1993, 279 people were employed in hotels/restaurants and 210 in public administration. By 2001, the number of people employed in the hospitality sector has grown to 412, an increase of 45%, whilst the number employed in public administration has dropped to 152, thus a decline by 28%.

The comparison is important since the focus should be on encouraging and fostering the sustained development of key growth sectors such as hospitality and retail as a counter to the continuing national, and local, decline in manufacturing, public administration and agriculture.

The importance of Moyle's hospitality and tourism sector is illustrated by the fact that more than twice the number of people work in this sector than the Northern Ireland average (table Three below). As will be illustrated later in the report, this sector appears to offer the greatest opportunity for future growth, and is an area which, if it does meet its potential could have a very positive knock-on effect to the area's retail sector.

Interestingly, the biggest single area of service sector employment is within the retail and wholesale trades, accounting for some 590 employees. The majority of this employment is centred on the district's principal towns of Ballycastle, Bushmills and Cushendall, all of which are traditional market towns that primarily service their local catchment populations. The research carried out has shown that these towns are used by local people primarily for grocery and convenience shopping, whilst the area does experience high levels of leakage to the neighbouring provincial towns of Coleraine and Ballymena, particularly for clothing and general household goods.

Table Three - Service Sector Employment in Moyle

	Moyle No.	*Moyle %*	*NI %*	*LQ*
Wholesale & retail trade; repairs	590	19%	18%	1.06
Hotels & restaurants	412	13%	6%	2.16
Transport, storage & communication	146	5%	4%	1.25
Financial intermediation	38	1%	2%	0.5
Real estate, renting & business activities	75	2%	8%	0.25
Public administration & defence	152	5%	9%	0.55
Education	535	17%	10%	1.7
Health & social work	457	15%	15%	1
Other services	159	5%	5%	1
Services	2,564	81%	78%	1.04
Total Employment	3,148	100%	100%	

Whilst the transport and communication sector employs less than 150 people, it plays quite an important role in the area's economy. It would appear that this is a reflection of the area's peripherality and the need for transport services.

Public services account for 1,144 jobs in the area and fall into three distinct categories – education, health and social work, and public administration. The area has a very high employment level in education (some 70% above the Northern Ireland average), which may be a reflection on an above average number of small schools serving a rural area. Whilst the health sector reflects the Northern Ireland average, the area has very low levels of employment (almost half the Northern Ireland average) in public administration and defence.

Moyle's location and low population base offers a likely explanation for its low levels of employment in Business Services (perhaps the key driver of service sector growth in the UK), which tend to cluster around key centres of population.

2.7 Service Sector Companies In Moyle

In developing the new Moyle Trade Directory on behalf of Moyle District Council, TEDI Sales & Marketing made contact with all key firms or business individuals in the area with a view to offering them an entry in the directory.

As a result of this process, 582 services sector firms were identified in the district. These are categorised below:

Business and Professional Services	42
Retail	123
Consumer Services	103
Hospitality Services	220
Transport & Travel	48
Environmental Services	4
Agricultural Services	21
Business Support / Government Utilities	21

In terms of the long-term development of the services sector in the district, these categories and the firms contained within the trade directory should act as a useful baseline in plotting the growth of the service sector in Moyle.

3.0 Research Findings

3.1 Overview

In order to gain a fuller appreciation of the strength, or weaknesses, of the service sector in the Moyle district, a variety of detailed surveys were carried out with three key target groups who would have most impact on the development of the service sector in Moyle.

These included:

- Local Consumers/Service users
- Visitors to the Moyle District
- Service Providers /Traders within the area

In talking to these people (215 in total), one hoped to gain a very realistic view as to what could be done to improve (if needed) the appeal of the area and its services. These views would form the basis for the action place in the second half of this report.

3.2 Service Sector Survey of Needs – CONSUMER Research

In carrying out the service sector audit in Moyle, a wide range of people were asked for their views as to why they used the towns in Moyle for shopping and services, their opinions on their experiences on shopping there; where, why and for which goods did they go elsewhere and their opinions as to what could be done to improve the towns.

The following section provides an outline of the feedback from 120 people who were interviewed face-to-face on the 19th July in the towns on Ballycastle, Cushendall and Bushmills. Responses are provided for the three towns as a whole but where appropriate, individual towns are referred to specifically.

3.2.1 Retail

All 3 towns are used primarily for grocery shopping and to avail of local services (although Bushmills residents are those most likely to go to the neighbouring town of Coleraine).

Regarding general household and shopping for clothes, people were much more likely to go to Coleraine (in the case of Bushmills and Ballycastle) or Ballymena (Cushendall). People shopped elsewhere for these items due to better variety, better quality or the fact that goods were less expensive.

3.2.2 'Why Shop in Moyle?'

The main reasons given for shopping in their local town was that "it was handy", followed by people factors ("meet people they know" or "people are friendly") in Cushendall and Ballycastle or "good grocery shops" in Bushmills.

3.2.3 'New Shops Needed?'

In terms of new shops needed, generally people wanted more "big name" shops (more so in Ballycastle) or new clothes shops. People in Bushmills were more likely to say that their town had everything for a town of its size.

3.2.4 'New Services?'

When asked what new services could be added to their town, people in Bushmills again were most likely to say it had everything. Those questioned in Ballycastle thought the town needed better public toilets and leisure/swimming facilities, whereas in Cushendall, they felt there was a need for a leisure centre and better entertainment.

3.2.5 'What would make consumers shop more in Moyle's towns?'

When asked what would make them shop more in the three towns, the following answers were given (in order or priority for each town):

Table Four - 'What would make consumers shop more in Moyle's towns?'

	Ballycastle	Bushmills	Cushendall
More Big Names	1	6	1
Ease Traffic Congestion	2	1	3
Lunchtime Opening	3	7	6
More upmarket Stores	4	4	2
Upgrade Town's Appearance	5	5	4
Make Shops Look More Attractive	6	3	7
Provide More Free Parking	7	2	5

Again, residents in Bushmills showed their belief that the village was well served for its size. This belief could be fuelled by the fact that, of the three key towns in Moyle, Bushmills is the closest to a large town, and it's easy access to Coleraine meant that anything beyond their day-to-day needs can be bought there. Distance appears to be more of an issue in Ballycastle and Cushendall, where residents felt they could benefit from having 'bigger name stores' in town.

3.2.6 'Improving Moyle's Towns?'

When asked how their towns could be improved in general, parking was the biggest issue in Bushmills and Cushendall, whilst Ballycastle again felt that the town could be improved by attracting bigger name stores. Other issues felt to be important in Ballycastle included: improving shop fronts, pedestrianisation and better bus services.

In Bushmills, the need to repair derelict buildings was seen as the next key need, followed by the need to attract bigger names and ease congestion.

In Cushendall, other pressing issues included the need for a spruce up for the town and the need to attract bigger names.

3.2.7 'Moyle's towns main advantages for shopping/services?'

When asked what the main advantages of Moyle's towns from a shopping/service perspective, convenience ranked in the top two in all three towns, but this was more evident in Bushmills (6 out of 10) compared to only one in four in Cushendall and Ballycastle.

Interestingly, half of those interviewed in Cushendall felt that its people were its biggest asset, and liked their friendliness/laid back nature. This was also the case in Bushmills, where just over one in four held the same opinion (Rank 2). One in four in Ballycastle held the same view (Rank 3).

Ballycastle's physical assets were seen as a key advantage i.e. its seaside location and town buildings ranked highly (2&3). This was also the case in Bushmills.

3.3 Service Sector Survey of Needs – TRADE Research

In addition to gaining the views of consumers of services in Moyle, a survey was carried out amongst providers of services in the district. This was done to see if, and how, their opinions differed from consumers, but also to gain an understanding of what barriers to growth the service sector in Moyle faced. Feedback was also received on their own development needs, to gain views on what could be done to help them, as businesses or individuals, to move forward.

A total of 45 companies responded to the postal survey, findings of which are presented below:

3.3.1 Providing new services in Moyle

Generally speaking, the area's business people tended to be much more imaginative and visionary in their views, feeling that the area could benefit from:

- More tourist or specialist retail outlets such as craft studios and craft shops, delicatessen outlets for local produce etc.
- Better indoor/wet weather facilities (a view widely held by tourists to the area), better eating places and most specifically a cinema.
- Better access to banking facilities/ATM's and travel agents were the key responses for new services

Regarding public services, the key three responses (in order of priority) included the need for better recycling facilities, improved public toilets and better promotion of tourism.

3.3.2 Improving Existing Services (Unprompted Response)

In terms of how existing services within Moyle could be improved, responses to this question could generally be categorised into a number of sections:

a) Environmental Related Issues

- Greater environmental awareness/recycling
- Environmental improvements in towns
- Removal of old cars
- More street cleaning/grass cutting

b) Tourism Related Services

This area prompted a high level of debate, where the key consideration appeared to be the need to provide a wider variety of facilities/entertainments for all age groups (particularly young people).

Other areas where local business people felt improvements could be made included the need to:

- Develop/promote weekend packages for tourists
- Encourage more B&B/Self Catering
- Improve customer care in restaurants
- Improve co-ordination and promotion of tourism
- Improve access to the countryside and to promote walks

c) Retail

In terms of retail, only two issues were highlighted, both of which could have an obvious impact on improving the level of customer services in the area.

- Late night shopping one day per week
- Shops open at lunchtime

d) Public Services

Regarding public services, the key issues highlighted include:

- The need for better transport links to Belfast and to rural areas
- The need for better car parking at Ballycastle sea front
- Improved Public toilets
- Police crack down on vandalism/anti social behaviour

3.3.3 **Area's Key Strengths** (Unprompted Response)

When local business people were asked what they felt the areas key strengths were, the following responses were given:

Table Five – Key Strengths of Moyle

Feature	*%*
Natural Beauty	28
People/hospitality	15
Giants Causeway	11
Culture/History	7
Tourism	7
Beaches	6
Glens	5
Outdoor Activities	5
Coastline	4
Quality of Towns	4
Music/Craic	4
Community Spirit	2
Old Bushmills Distillery	2
Lammas Fair	1
Good shops (B'Castle)	1

Base = 86 responses

It is interesting to note that the area's natural assets – physical beauty, people and culture all featured very highly in the minds of the area's business people but very little acknowledgement was made of two key features of the area – Bushmills Distillery and the Lammas Fair.

3.3.4 Weaknesses

Key weaknesses of the area, in the opinion of local business people are included below.

Table Six – Key Weaknesses of Moyle

Weakness	*%*
Lack of Leisure/Entertainment facilities	20
Distance from service centres	13
Lack of targeted promotion/advertising	9
Wednesday closing	7
Lack of facilities for young people	7
Planning	7
Inability to tap into quality tourism	7
Lack of enterprise culture	7
Lack of Employment opportunities	7
Low Population	4
Poor customer care	4
Rubbish	4
Vandalism	4

Base = 45

3.3.5 Key Challenges facing Service Providers in Moyle (Prompted Response).

Whilst local traders and service providers felt that they faced a number of personal challenges such as finance, staffing issues and excessive regulations, the single biggest challenge faced, in their opinion, was the lack of visitors coming to the area.

This, in a sense, appears to sum up the current situation in Moyle - the area is relatively well provided for in terms of its local services, it has a wide range of natural and other visitor attractions, it has a good stock of accommodation, and its people are a key asset.

However, it appears, in opinion of local people, that the key factor missing in the equation is a lack of visitors to the area.

Table Seven – Key Challenges Facing Service Providers in Moyle

	Challenges	*% Score*
1	Lack of visitors to area	29
2	Excessive regulations (planning, insurance etc)	21
3	Lack of business support	16
4	Staffing Issues	15
5	Finance	12
6	Lack of IT skills	7

Base = 121

3.3.6 Overcoming Barriers

In terms of overcoming the challenges highlighted above, suggestions included:

a) Lack of Visitors

i) **Better promotion of area through**: more creative tourism ideas, selling environmental tourism, winter breaks, weekend breaks, putting tourist information into local shops, marketing Moyle specifically, marketing the Glens specifically, better web links.

ii) **Retaining tourists in the area by:** encouraging coach tours to stop in the area, developing better facilities/entertainment, improving the retail offer, develop walking tours, provision of wet weather facilities, providing coach parking in villages, extend the tourism season.

iii) **Develop housing projects away from the coast** and into local villages, thus regenerating these local villages and protecting the Causeway.

b) Overcoming Excessive Regulations

Suggestions included:

- Allow more access to countryside
- Allow planning permission for 'An Crachan' style self catering accommodation.
- Ease restrictions of use of domestic premises for enterprise.
- Lobby for insurance to reflect the situation in the area.

c) Business Support

It is interesting to note how they feel local business should be supported, where they felt that:

- More one to one support should be provided, where the focus should be on people and less on programmes and bureaucracy.

d) Staffing Issues

They also felt that staffing issues could be better dealt with by providing:

- Better education/training for companies
- Better links with schools
- Set up a local agency to provide temps

e) Finance

Following on from business support, when asked how lack of finance for investment could be tackled, suggestions included the need to:

- Set up a Seed Fund
- Improve attitude from banks/agencies to SMEs
- Provide 90% grants for tourist providers
- Cut out irrelevant grants/programmes and pump prime capital projects
- Cut Red Tape

3.3.7 Meeting Company Development Needs

Table Eight – Needs of Service Providers

	Need	%
1	Sales/Marketing	22
2	Customer Care	18
3	Staffing/Human Resources	16
4	IT	14
5	Accounting/Finance	13
6	Internet	12
7	Language Skills	7
		100

In terms of their company development needs, the single biggest area where they felt they needed assistance was in sales and marketing, with more than twice as many seeing a need for assistance in this area compared to internet or language skills.

3.4 Tourist Attitude Survey

In order to get an understanding of an outsider's view of Moyle, 50 tourists were interviewed in Ballycastle (20), Bushmills (17) and Cushendall (13), on 27th August 2003.

Of those that were interviewed, almost half of them (46%) were visiting Moyle for the first time, whilst the same percentage was from outside Northern Ireland.

Table Nine – Origin of Visitors Surveyed

Origin of Visitors Surveyed	*%*
Northern Ireland	52
Great Britain	16
ROI	14
EU	10
USA	8

3.4.1 Attractions/Areas Visited

In total, two thirds of those people surveyed within the district tended to go to Ballycastle, with around half going to the Bushmills/Bushmills Distillery and the Giant's Causeway. Approximately one third of people visiting the area took a trip to Rathlin Island and/or the Carrick-a-Rede Rope Bridge.

3.4.2 Main reasons for Visiting Moyle Area

The two key reasons for coming to the area were to sight-see (44%) and simply to relax and enjoy the peace and quiet of the area (24%).

3.4.3 Key Advantages

When asked what the felt the key advantages of the area were, just over two thirds of those surveyed felt it was the peacefulness and tranquillity of the area (68%), followed by the natural beauty and scenery (54%). Other key advantages cited included: friendliness of the people (26%), the fact that there was such a wide range of attractions within close proximity of each other (24%), and the character/feel of the area's towns (10%).

3.4.4 Main Disadvantages

From a positive perspective, less people were able to cite disadvantages of Moyle. One in five of those surveyed made the point that there was a lack of things to do at night. Others commented on the fact that: the area was "too far out of the way" (14%), "the public toilets were quite poor" (12%), and that "there was nothing to do in wet weather" (12%).

It is interesting to note that those issues which tended to aggrieve local people - car parking and lack of big name shops, were only mentioned by 8% and 2% of visitors to the area.

3.4.5 Improving the area's towns

The top answer to this question, perhaps surprisingly, was that 22% of those surveyed felt that, as visitors to the area, the town's had all they needed. Indeed, one visitor, in Ballycastle stated specifically that nothing needed to be done, as he "loved the culture and traditional feel of the town."

Other answers worthy of mention included the fact that the towns could be tidied up or made to look more attractive (14%), or that a good restaurant was needed (12%).

3.4.6 Improving Services and Leisure Tourism Facilities

When visitors to the area were asked what could be done to improve services or leisure facilities in the area, key responses were they hadn't been there long enough to notice anything" (18%), it had everything it needed (18%) or they couldn't think of anything that could be done to improve the area (14%).

In terms of constructive comments, key comments included the fact that the area needed good restaurants (16%), that better access was needed to tourist information (12%), and that better wet weather facilities were needed (12%).

3.5 Summary of Research Findings

One of the key challenges facing Moyle in its desire to develop its service sector is the need to attract higher levels of visitors to the area to avail of its many attractions.

Whilst the development of the actions outlined in this plan are important in ensuring that visitors and local people are provided with a first class service experience in an area which not only has a built natural environment to match, of key importance is the ability of the region to attract visitors.

Due to its very limited/small population base, the service sector in Moyle will not be able to flourish and grow if it cannot access a wider range of service users. Apart from setting up/or attracting key business services, which have the potential to export their services, the key method in developing the sector will be to draw service users into the area.

As highlighted in the report already, the district's retail sector primarily services a local population which, generally, is equally capable of going to surrounding areas to avail of a wider variety of goods and services. Whilst there is a desire, on behalf of the area's consumers, to attract more 'big name' retailers to the area, Moyle population base of only 16,000 is unlikely to attract these type of retailers who most likely are already located in neighbouring towns such as Ballymena and Coleraine. From this regard, future retail growth is likely to be in retail outlets which complement the area's tourism sector, such as craft shops and specialist food shops/delicatessens.

In plotting the way forward for Moyle's service sector, the approach outlined later in this report is based upon a number of factors:

- The ability of key players, both in the public, private and voluntary sectors, to create an environment that is conducive to service sector growth.
- The building up of skills, resources and expertise, which will ensure that, when visitors do come to the area for the first time, that they are likely to return for repeat business, or just as importantly, likely to recommend the district to others.

But perhaps of most importance will be the ability of the district to actively market itself as a key tourist destination. This will be dependant, partly on the public sector to pump prime the process and create awareness of the district, but most importantly, it will depend on the private sector to come up with a range of quality, innovative ideas which attract people to the area to stay, and to return to their individual establishment, or groups of establishments, as the case may be.

4.0 Marketing Issues

If the Moyle district is to pro-actively promote itself as a district tourism destination, a starting point in this process would be to have a clear idea as to what would be promoted and the need to sent out a single, but effective message.

4.1 Place awareness Survey

4.1.1 Background

In order to assist Moyle in developing this message, a survey was carried out by TEDI into people's awareness of place names and locations in Northern Ireland.

This was done to get a feel for people's understanding of Moyle and its key towns/attractions, so that if the district needed to be more proactive in promoting itself, this research would provide a better understanding as to what needed to be done.

4.1.2 The Survey

The survey was completed in 5 main towns/cities in Northern Ireland:

Ballymena
Belfast
Derry
Omagh
Portadown

In each location, 20 members of the public were randomly chosen and given a list of 12 towns/areas or tourist attractions in Northern Ireland. They were then requested to state whether they recognised the location and knew where it was.

The following table highlights the results of the survey.

Table Ten – Recognition of Place Names in Northern Ireland

	Place	Know	Heard of .	Don't Know
1	Odyssey	91	5	4
2	The Glens	66	5	29
3	Bushmills Distillery	65	14	21
4	Portstewart	64	14	22
5	Newcastle	61	9	30
6	Ballycastle	60	17	23
7	Ulster Museum	57	6	37
8	Causeway	56	21	23
9	U-A Folk Park	51	6	43
10	Lough Erne	41	6	53
11	Cushendall	32	19	49
12	Moyle	28	15	57

4.1.3 Comments

Whilst awareness levels of the Glens (66%), Bushmills Distillery (65%), and Ballycastle (60%) were quite good, Moyle (28%) and Cushendall (32%) had the lowest levels of recognition amongst those surveyed.

Surprisingly, only 56% (8^{th} out of the 12 areas listed) of people were aware of where the Giant's Causeway was, although it did have the highest amount of people saying they were aware of it but didn't know where it was (21%).

Overall, recognition levels were highest for the Odyssey in Belfast, where up to 91% of those surveyed recognised it and knew where it was, whilst the other 6% heard of it but didn't know where it was located. Only 4% of those questioned had never heard of the Odyssey.

This contrasts significantly with Moyle, which the highest percentage (57%) of respondents didn't recognise the name, or location.

The Odyssey scenario is interesting due to the fact that, whilst it is a very new attraction, it has managed to gain high levels of recognition amongst people throughout Northern Ireland. It can be assumed that this has come about through strong proactive promotion and publicity.

Moyle, by contrast, does not exist as an actual location, but in fact, the name for the local district council. However, what is interesting, is the generally high levels of recognition for some of its towns and attractions (Ballycastle, The Glens, Bushmills Distillery and the Giants Causeway).

Bearing these facts in mind, the key challenge for Moyle in terms of branding its promotions is whether it should keep the word 'Moyle' and aim to increase the low levels of awareness that currently exists, or should it focus on its key attractions and towns, where awareness is already quite high.

A possible solution would lie in embracing a slogan such as 'Moyle – the Heart of the Causeway Coast and Glens' which would solve the two issues above and also re-enforce Moyle's position as the key asset in the wider council-led Causeway Coast and Glens Consortium.

This slogan could easily be branded with a Moyle text and logo that could not only be used by the council's tourism department, but can be shared by private operators in the area. A good recent example of this is the new '*Donegal*' logo, which is used on general tourism brochures but also by individual hotels and restaurants in their press advertising. This has had the dual benefit of strengthening the overall brand awareness and giving local hospitality providers a greater sense of belonging to the 'Donegal' brand.

4.2 Developing Moyle's Unique Selling Proposition

In carrying out all the areas of research for this report, a consistent theme emerges which can be summarised in two key words:

PEOPLE
Where local people and visitors make it very clear that it's people is one of their principal reasons for coming into the towns to avail of services (locals), or when visitors say that one of the area's key advantages is the friendliness of its people (visitors).

PLACE
This is characterised not only by the area's outstanding natural beauty, but also the area's traditional built environment in its towns and in historical attractions such as the Bushmills Distillery.

It is this blend of people and place that gives the essential feel and unique selling point that is Moyle.

4.2.1 Why Tourists visit certain areas

In coming to this conclusion about Moyle, it was decided to test this theory of people and place with some more renowned locations to see what motivated people to come to these areas. In this regard, we looked at the key motivations for tourists coming to Cornwall, The Highlands of Scotland and the Republic of Ireland.

The following paragraphs are taken from recent research studies carried out in each region and show visitors key motivations for coming to each area, as well as key activities undertaken.

4.2.2 Cornwall

Main motivations for coming to Cornwall were:

1. Natural Beauty.
2. Enjoying the countryside.

Key Activities undertaken while there included:

1. Strolling in the Countryside
2. Sightseeing
3. Going to the Beach

4.2.3 Highlands

Main motivation for coming to Highlands - Scenery.

Key Activities undertaken while there included:

1. Sightseeing/Touring (92%)
2. Shopping (48%)
3. Museums, Art Galleries and Heritage Centres (33%)

58% took part in outdoor/sporting activities of which low level walking (41%) was the most popular activity.

Most Popular Food and Drink Products Bought:

- Bakery Products (47%)
- Shortbread (46%)
- Malt Whiskey (33%)

4.2.4 Ireland

Main motivation for coming to Ireland

1. Friendly, Spontaneous and Hospitable people
2. A beautiful and unspoilt natural environment

4.2.5 Summary

Whilst the quality of the natural environment was a key factor in attracting people to Cornwall, the Highlands and Ireland, the fact that people is seen as being the single biggest factor in Ireland is of major relevance.

In carrying out the survey, the responses obtained shows that the Irish holiday experience is exactly that of Moyle's, where, in Board Failte's words "Irelands USP (Unique Selling Proposition) is its PEOPLE – something that other tourism destinations cannot match". In learning from best practice elsewhere, Moyle very clearly needs to focus its efforts in ensuring that its USP – its people, is a match for its other great asset, its natural beauty.

Of interest in the Highlands survey is the section on most popular food and drink products bought, later in the report attention is paid to the concept of rural tourism and how an area's natural resources can be best 'exploited' to maximise tourism potential. The use of food is an area which is focused on in particular but of relevance here is the similarity between Moyle and the Highlands food offering, where Bushmills Whiskey, combined with proactive branding of bakery products and shortbread, could enhance the tourism offer in Moyle.

Urban renaissance in a smaller town – HORSHAM, West Sussex (pop. 43,000)

Horsham, a medium-sized market town, has been transformed from a dowdy to a delightful place. The catalyst was the rapid growth of Crawley only 7 miles away, and the realisation in the mid-1980s that to compete Horsham needed to position itself as a place with character and tradition, a counterpart to the New Town.

Its success in doing this has been mainly due to the District Council's ability to form genuine partnerships with key investors in order to orchestrate the range of investments required and its insistence on good design and high quality standards for both buildings and the public realm in order to reinforce the character of the town.

Context

Horsham is a long-established market town on the A24 between London and the South Coast . Its population has grown to over 40,000 and it is the only town of any size in a largely rural District. It has undergone substantial improvements over the past 15-20 years, without apparently losing its character.

Two factors underlie the changes that have transformed Horsham but still kept it an attractive and delightful town. First, a new Chief Executive was appointed in 1982. Secondly, it was realised that Crawley with its highly functional, modern facilities was becoming a strong competitor and would inevitably outperform it in some ways. It was thus necessary for Horsham to differentiate itself as clearly as possible from Crawley, playing on its own particular strengths and avoiding head-to-head competition as far as possible.

Over the past 20 years Horsham has set out to transform its centre into an attractive, high quality shopping area containing a range of independent, specialist shops, which contrasts with and complements functional Crawley with its many high street multiples. This was based on the conviction that Horsham had something distinctive to offer. Although it was not a historic town with attractions that could put it on the tourist map and although it was somewhat dowdy and clogged with traffic, it was nevertheless at heart an old market town with considerable potential charm – even though this was somewhat spoiled by a 1960s office tower block.

In the boom of the mid-1980s, there was strong pressure for office investment in the town centre and for out-of-town retail development. Horsham could have followed the fashions of the times and ended up like many small and medium-sized market towns which found themselves in a self-reinforcing spiral of mediocrity and decline.

However, Horsham chose another path – building on its basic (but unremarkable) strengths; making use of the power of market forces when they were advantageous; using its planning powers to resist them when they were not; insisting on good design, high quality and the conservation of the character of the town; being willing to invest its own money to improve infrastructure and public services, enhance the public realm and demonstrate commitment; keeping in mind the aim of creating an attractive, pedestrian friendly centre in which people wished to spend time as well as shop (an essential step in any urban renaissance); and ensuring that it had facilities and activities that appealed both to local residents and customers from further afield.

Environmental Responsibility

A commitment to improving the environment, in its widest sense, has been fundamental to the changes that have taken place in Horsham.

Although the District Council was not the highway authority it orchestrated an astute scheme to unblock the town centre and to start making the most of its assets, based on a policy of "people first".

Once the town centre was freed from traffic, it was partly pedestrianised and the rest made into a 20 mph zone, where pedestrians and public transport (buses and taxis) have priority. This in turn allowed extensive improvements to be made to the public realm, including attractive pedestrian routes through the area with gardens, artworks and open spaces. In an award-winning scheme the Carfax was refurbished as a town square and meeting area (with a single lane roadway along two sides), with high quality York stone paving, numerous trees and well-designed street furniture to complement the existing bandstand.

The policy of greatly reducing traffic in the town centre, encouraging the redevelopment of some major sites and improving the pedestrian environment has indeed had a major impact on the economy and image of the town centre, which is now seen as a pleasant place to shop and spend time in with a wide variety of independent shops and services, including restaurants and cafes and catering for the whole family. All the shopping precincts in the town centre have been upgraded by their owners. Partly as a result of this Horsham is now seen as one of the most desirable places to live in, and the rise in house prices has been one of the highest in the South East.

Design Excellence

Good quality and design excellence have been hallmarks of Horsham's approach to redevelopment, and this has applied to both public and private sector developments. In part the emphasis on design, quality and character has been due to the plan to differentiate the town from Crawley. In part, however, it has also been due to the Council's overall objective of improving the quality of life in the District and the Chief Executive's own interest in and commitment to good design. The quality of both the buildings and the public realm were seen to have an important effect on how the town was perceived, and then on how it was used.

This interest in design has in turn attracted people with design skills to work for the District Council, and a culture of commitment to good design and high quality has grown up within the local authority. This has spread, for example, to departments that are responsible for maintenance, and through them to their counterparts in the utility companies who now know the standards that are expected of them in Horsham. It has also meant that high quality standards have been enforced in private sector developments through the planning system, and that the main private sector investors have seen themselves as being in partnership with the Local Authority in enhancing the town in ways that have led to commercial as well as aesthetic improvements.

Social Well-being

Improving the environment and image of the town and repositioning it economically have only been part of the wider strategy for improving the quality of life in the town, although they were seen as important foundation stones.

Renaissance Process

Vision

Horsham might have resisted change or passively followed the various development fashions that have swept through much of the UK in recent years. Instead, it took a firm line of its own, undergoing substantial change in many respects but with a strong sense of doing so to regain, and retain, its own particular character. Its vision of differentiating itself from Crawley, but still sharing in the latter's undoubted commercial success, and of improving the quality of life for those who live in or work in the town has proved to be highly relevant.

Phased Strategy

Horsham has been deliberately changing for over 15 years, and more changes are still being planned. Its undoubted success would seem to reinforce the view that there is a more or less logical series of steps on the path towards renaissance. First, it is necessary to **ensure that the economy of the town**, **and particularly the town centre is strong**. This means working with key employers, or potential employers to make sure that their plans and requirements can be taken care of, and then ensuring the health and diversity of the town centre. In Horsham, this not only required repositioning the town centre relative to its competitors, and changing its image, but also involved extensive investment to tame the traffic while still leaving the centre accessible.

Thereafter, attention can be paid to improving the environment, particularly for pedestrians, by **enhancing those features of the town that give it a special character and by maintaining the public realm to high standards**. It is in this aspect that Horsham has excelled. By insisting on good design and high quality, not only in its own work but also in the development of key sites by the private sector, it has succeeded in creating a highly attractive town centre. Not only has the centre won several awards for good design, including Civic Trust and RTPI awards, but it is commercially successful, which helps make the town a highly desirable place to live in.

Key Lessons

Renaissance can take place in a smaller town. Horsham, although pleasant and situated in a prosperous area, is not particularly special. Yet, it has transformed itself over the past 15 years, and is now seen as one of the most desirable places to live in the South East. Key factors appear to be:

- A realistic and popular vision as a place that is complementary to Crawley
- The realisation that a pleasant, traffic free environment for shopping, which emphasised Horsham's special character and encouraged people to spend time in the town centre, was the route to success
- Proactive planning and genuine partnerships with the main private sector investors, leading to the successful orchestration of their investments – which produced synergy for all concerned
- The ability to raise substantial discretionary funding early on, to help pump prime the renaissance process
- The insistence on good design and high quality in both private sector schemes and the public realm. Not only did this again contrast with Crawley, but it also came to be seen as contributing directly to the quality of life in Horsham
- Developing trust from both investors and residents.

Hay-on-Wye - the 'Second-hand Book Capital' of the World.

Hay-on-Wye was the world's first Book Town (founded in 1961) and lies on the border between England and Wales. The town square is dominated by Hay Castle, a semi-restored building of great charm.

One of the major events of the year for Hay is the Hay Festival of Literature. Booktown has in stock all of the books of the authors and speakers at the festival.

Hay-on-Wye is situated on the River Wye and nestles beneath the Black Mountains, which are part of the Brecon Beacons National Park. Visitors can participate in walking, pony trekking, hang-gliding and other open-air sports in the countryside around the town.

There are over 100 accommodation providers in the town, and tourists come from all over the world to stay in Hay-on-Wye and browse in its 40 bookshops.

Wigtown - Scotland's National Book Town

There are 30 book related businesses in Wigtown, and its sister villages Bladnoch and Kirkinner, which offer a varied range of books including Scottish, English and Irish literature; antiquarian and illustrated books; rare and unusual literature; first editions and collectables; special interest and children's books.

The town hosts bookbinders, publishers and arguably the largest traditional second hand book-shop in Scotland outside of Edinburgh and the printer of the smallest books in the world. One of the shops has a small café at the rear (16 covers) and another houses a gallery selling pictures, local crafts and a framing service to gallery standards.

Many of the shops are dedicated book-shops but about eight also sell a range of complementary goods such as toys, musical instruments and sheet music, herbs, craft items and gifts.

Wigtown is also home to world renowned Historic Newspapers - winner in 2002 of the U.K.'s Best Small Business Award.

Books are the town’s key attraction but other attractions are available within the wider Machars area – from walking, cycling, fishing or golf to Off Road or Tank Driving.

From spring to late Autumn there is a busy festival programme with something for all ages. This activity culminates in the annual Literary Festival at the end of September – a unique and very Scottish celebration of the written word. This year invited guests include Melvyn Bragg, Kate Aidie, Douglas Dunn, the Solway Poets, Alastair Reid, Mari Hedderwick, Pauline Earles, Des Dillon and Colin Bell.

Quote from website - “Here in Wigtown we take a slightly more relaxed view of life and we invite you to come and sample our hospitality. We should however let you know it may take you a little time to get here as we are a little off the beaten track. Somewhat perversely however we consider this to be one of our main selling points. The time it takes to get here is just what you will need to unwind, cast off the pressures of city life, slow down, relax and be reminded of what quality of life is really about. We look forward to meeting you, your friends and your family – Ceud mile failte – *A hundred thousand welcomes*.”

Essence of Moyle Good Food Initiative

Rationale

A good quality, value for money meal is a guaranteed way of making a good impression whether it is breakfast in a B&B or three course meal in a restaurant. Research carried out in the UK has shown that between 60-70% of holiday makers recognise that food makes a positive contribution to their holiday, 40% said it contributed “a lot”. The variety of catering establishments such as pubs (the most popular venue for eating out by tourists), teashops, café and snack bars, fish and chip shops, and restaurants, therefore play a vitally important part in a locality’s tourism product.

Around a fifth of day visitor expenditure in rural areas is on eating and drinking, and about half of overseas expenditure is in shops and restaurants. Ensuring visitors are aware of the location of shops and eating facilities through information provision and promotion can encourage greater expenditure.

Tourists holidaying in rural areas are also interested in local foods and crafts from “gastro-tourism”. Greater accessibility to local food and drink can therefore add to the visitor holiday experience at all levels. Furthermore, promoting and selling local products can benefit business’s standing in the local community.

What is local produce?

Local produce is defined as “food and drink that is produced in the local area or local speciality food that has a local identify”. This includes farm gate sales, regionally branded and locally produced products and local speciality products that are in some way distinctive to an area. Crafts can also be considered local products.

Local produce has a sense of local identity and close associations with the countryside. It benefits the landscape through sustaining farming locally, retains more money in the local economy and saves on transport costs and pollution associated with the movement of goods.

Local produce is perceived as distinctive, fresher, tastier and healthier by customers. There is a perception that local produce is traditional and part of more natural farming practices rather than those of mass production. These link well with rural tourist themes of rest, relaxation, good scenery and discovery.

Access to and awareness of, local food and drink is therefore crucial, giving visitors the opportunity to sample it and buy it. Whilst there is an evident shortage of food producers in the Moyle area, local retailers and hospitality providers should be encouraged to take the lead in promoting good food in the area. Key actions would thus include:

- Local pubs and restaurants **branding their menus by using local names and ingredients** (Bush salmon, Glens of Antrim trout and potatoes, Bushmills whiskey marmalade) and also to serve the occasional local recipe or local specialities.

- Local hospitality providers **promoting local places to eat** that serve local food and drink.

- Hospitality providers **providing information on where guests can buy local ingredients** such as local butchers, bakers, farm shops and village shops. Providing local recipes and specialities for visitors to try out in welcome packs could stimulate interest.

- Over a third of tourists make at least one purchase of local foods during their visit, with half of these purchases bought as gifts. Local shops should be encouraged to **stock local produce**. Such promotions may not be only of interest to the visitor but also to local residents.

- As part of this initiative, local entrepreneurs could also be encouraged to **develop and brand local products** which could become synonymous with the area e.g. whiskey marmalade, shortbread biscuits, specialist breads etc…

Links with Other Projects
It is intended that these initiatives would complement and add value to North Antrim Leader+'s Food Processing and North Antrim Inns Initiatives, whereby these developments would be incorporated and actively promoted under the "Essence of Moyle" Good Food Initiative.

Outputs
- Inventory carried out of local produce and food producer.
- Development of a range of recipe ideas and names for provision to local catering establishments.
- Development of an "Essence of Moyle" Good Food Directory, to provide details on key eating establishments, good food shops, local specialities and recipes.
- Development of an "Essence of Moyle" Brand.

West Cork "Fuschia" Brand

The region of West Cork, with ongoing support from the LEADER programme, has developed a distinctive image which is widely marketed by An Bord Bia, the government agency responsible for the promotion of Irish food, as an excellent example of regional food promotion and tourism provision – "West Cork's renown as a place of culinary excellence and quality endeavour, reflects positive local characteristics such as environmental quality as well as the richness and diversity of its landscape, heritage and tradition." (www.fuschiabrands.com)

Dingle, Co. Kerry

Dingle is a small town in county Kerry and has a population of about 1,200 people. Fishing and farming have long been its major industries, but tourism has become an increasingly important business in the town, particularly since the filming of "Ryan's Daughter" in the area in 1969.

As a market town and fishing port, Dingle has long been well supplied with pubs; Much of the social life of the town revolves around the town's 52 pubs: during the winter there are card games and quizzes. In the summer pool tables are removed to leave more room for tourist customers, and Irish music is played almost every night in about ten pubs.

For visitors based in Dingle there is a considerable variety of things to do, and in planning the day a key consideration will be the weather. Nonetheless, there are now a number of indoor activities for wet days including Dingle's own aquarium, Ocean world.

The town is renowned for its restaurants, most of which offer excellent local seafood. There is a wide variety of restaurants in Dingle, from burgers and chips to pub grub to fine dining. Most places today have several vegetarian selections on their menus.

There are many craft shops in Dingle town. There is good value to be found in the high quality handmade products in the craft shops – woven tweeds and woollen clothing, sweaters, leather goods, jewellery, turned wood, and pottery. There is a craft village, the *Ceardlann na Coille* located on the road leading west from the pier towards Milltown. There are several art galleries in the town as well, featuring the works of local artists.

In shopping for everyday requirements, visitors cannot expect to find the range of products available in large city stores; but, that said, there is a very respectable range for a town the size of Dingle. There are three supermarkets, a host of butchers, several small general grocers, and a fruit and veg shop.

There are three hotels in the town, a number of guesthouses, many bed and breakfasts, and several hostels. During the summer months pressure on accommodation can be considerable and anyone arriving on spec should not leave it till late to go looking.

Edited extract from www.dingle-peninsula.ie

A Taste of West Cork – A Caterer's Guide to the finest Local Produce, West Cork LEADER

As part of West Cork's Regional Branding initiative under the Fuschia label, a directory of local recipes was compiled. Based on the diversity and quality of local produce, the guide was designed as a training tool for caterers. All produce included carries a full product specification, producer details, product range, distribution, etc. All recipes are presented in an easy to use, step-by-step format.

As an aid to encourage greater use of top quality local produce, all recipes are fully costed and have been designed for inclusion into hotel, restaurant, or bar menus.

The "Fuschia" brand is also used for tourism services. It serves to set a high standard and hence improves quality levels in the area among food and tourism products.

Slow Food

What is Slow Food?
In 1989, the eminent Italian food critic and journalist, Carlo Petrini, was walking through Rome when he came upon a multi-national fast food outlet packed with youngsters. It struck him that if they were aware of the rich tradition of artisan food production which abounded in the Italian countryside, at least some of them would choose the latter over the former. Slow Food was born, to first and foremost educate people about this wonderful culinary resource in the face of the over-commercialisation and homogenisation of our diet.

Slow Food is an idea and a belief; the idea is that by celebrating the magnificent foods that are under threat from standardisation, bureaucratic hygienism, and commercialisation, we can ensure that these products continue to be made and, having the future of these foods, we are then able to enjoy them!

How is Slow Organised? From Italy, the concept has spread abroad and Slow is now active in forty countries around the world. With 40,000 members (and 500 Presidia Chapters) in forty countries, National Slow structures are springing up around the world, celebrating local traditions as diverse as llama jerky and traditional sushi. Slow Ireland is bringing together a dynamic grouping of enthusiastic producers and entrepreneurs with an appreciative consumer base to grow and encourage Irish artisan foods.

Convivia: These are the important local or regional chapters of Slow, a forum for members to gather and share real food and wine, engage in awareness raising about food-related issues, and support local producers. In Ireland, there are Slow Food convivia centred in Dublin, Kerry, East Cork, and West Cork, with many more planned north and south.

Who, and What, is Slow Food For? Primarily Slow is for producers and consumers, to bring together those "endangered, artisan producers" with the millions of consumers today who want to know about what they eat and drink. Slow Food is about developing taste rather than demeaning it, and whilst the movement has a cultural, educational, charitable, and scientific agenda, it is also dedicated to the defence of quiet material pleasure; Slow is fun!

In Ireland, Slow Food aims to bring international pressure upon issues which threaten the development of artisan produce, such as unreasonable hygiene considerations or the plight of the wild salmon. The Slow ethos offers a way forward for the rejuvenation of Irish agriculture and rural socio-economies, through encouraging value-added, cottage-scale foods to a premium world market place.

West Cork Convivium - The west Cork Convivium was started in l998 - the first active chapter of SLOW in Ireland, it has brought together the new food makers and the traditional industries - Wild Atlantic Salmon, farm made cheeses,honey, bread makers, eggs, butter and cream, sausages and smoked meats and fish, and much more....

The organic farming community in West Cork is at last thriving after the long struggle to bring the thinking behind chemical free farming to the region that had been allocated by central Government as an Agri-tourism area, The produce from these growers and farms, can now be bought at the Farmer's Markets that have come back to our region - part new, part traditional.

SLOWFOOD remembers the history of this region as clearly as it welcomes the new creative foods from all over the world. These foods can be found in the shops, Restaurants and markets of West Cork, made by people from this region and many who have come to live here, bringing with them their own traditions.