

July 2009

# Regeneration Plan for Derry~Londonderry

Towards A Baseline Needs Analysis

Sector Discussion Document

Marketing the Derry Opportunity

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This document draws upon a literature review undertaken by PricewaterhouseCoopers LLP (PwC). The sources of which are provided in Annex C. The literature review has been supplemented by additional secondary research and examples of relevant regeneration initiatives taken elsewhere currently known to PwC. It does not constitute a recommendation or advice on the part of PwC and should be used for discussion purposes only.

## Purpose of this Document

The purpose of this document is to provide the Sectoral Working Group (SWG) with a starting point for their deliberations. The document presents an initial overview of the key facts and issues facing the sector in the North West as well as providing some examples of good practice from elsewhere, based on desk research undertaken for this process.

## Introduction to the SWGs

SWGs are one of the key input processes being utilised to broaden engagement and collaboration in the development of the Regeneration & Investment Plans and the Equality Impact Assessment (EQIA) which is embedded in this regeneration process.

They are an integral part of the Organisational Framework set up to develop the Plans and the EQIA. SWGs are designed to bring the experience, expertise and knowledge of the wider community to bear on the Plans and the EQIA and, as part of an overall Communications & Engagement Strategy, to create a new level of wider civic buy-in to the Regeneration of the City and region.

### Mission

Our Mission is to deliver Renewal – Economic, Physical and Social, building a stronger and more vibrant economy with increased prosperity for our City and region, in ways which ensure that opportunities and benefits from regeneration are targeted towards the most deprived groups in our communities.

In using the words “targeted/targeting” throughout this document we mean that, in developing all proposals for the Mark II Regeneration and Investment Plans, the proposals must demonstrate how they will bring about measurable improvements for those groups who have been identified as experiencing inequality, for example in housing, education, employment, and health.

In seeking to deliver this Mission we recognise:

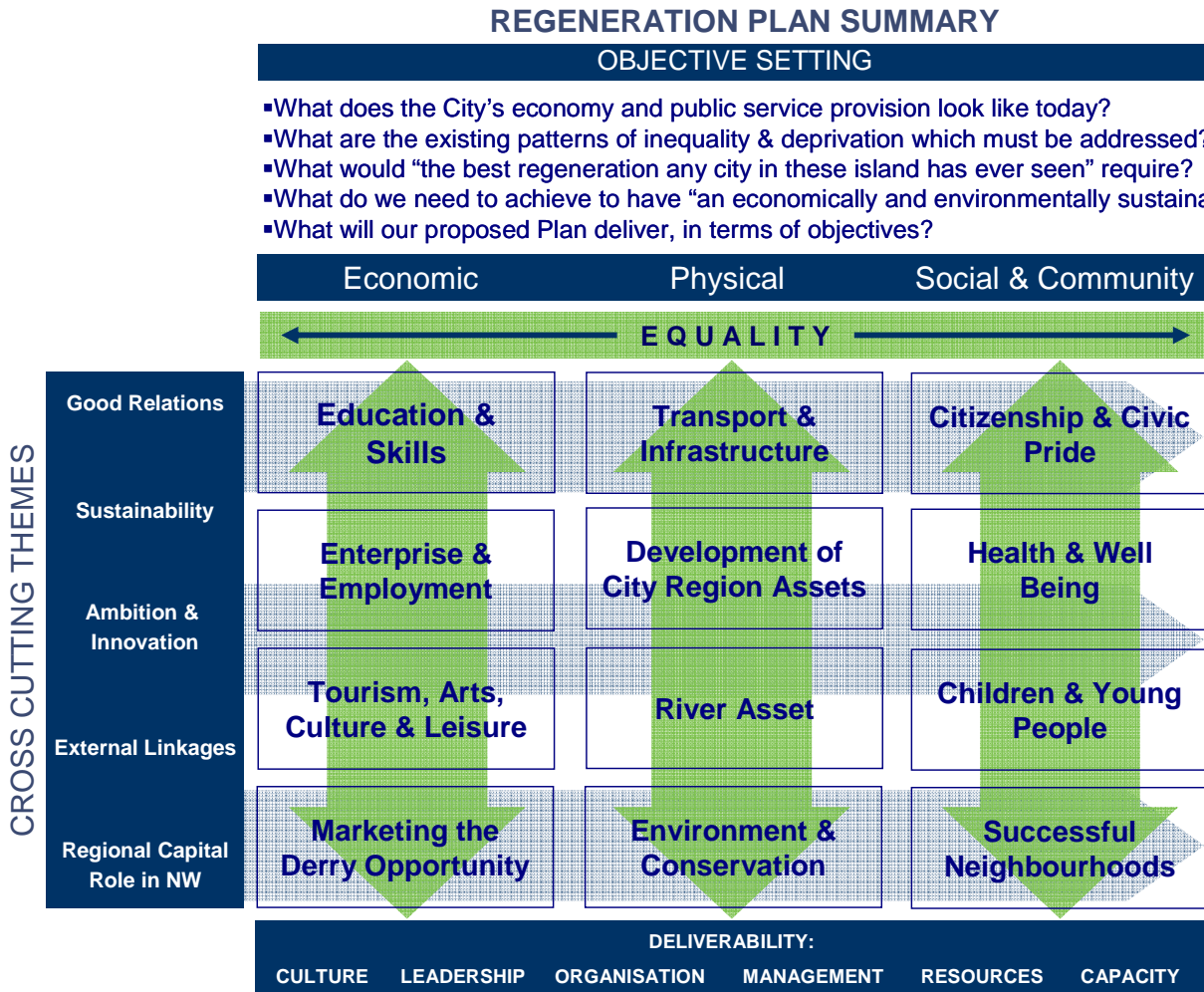
(a) that each of the elements set out in the Regeneration Plan Summary is an important part of the jigsaw which we must complete if we are to deliver sustainable economic and social development and be able to contribute to, and benefit from, a shared and better future based on equality – in which equality (as defined by Section 75 (1)), and good relations (as defined by Section 75 (2)) will be watchwords for action.

(b) nonetheless, although each of those elements is important in its own right, the paramount objectives of this new Plan will be:

- changing patterns by growing the local economy so that it can provide more jobs particularly targeted at groups identified as experiencing employment deprivation and inequality;
- promoting equality, in line with the NI Executive’s Programme for Government, our statutory obligations and, in ways which impact positively on the lives of citizens through, for example, improved health, education, housing and employment; and
- building genuine partnership – based on stronger working relationships, trust and mutual respect.

**Regeneration Plan**

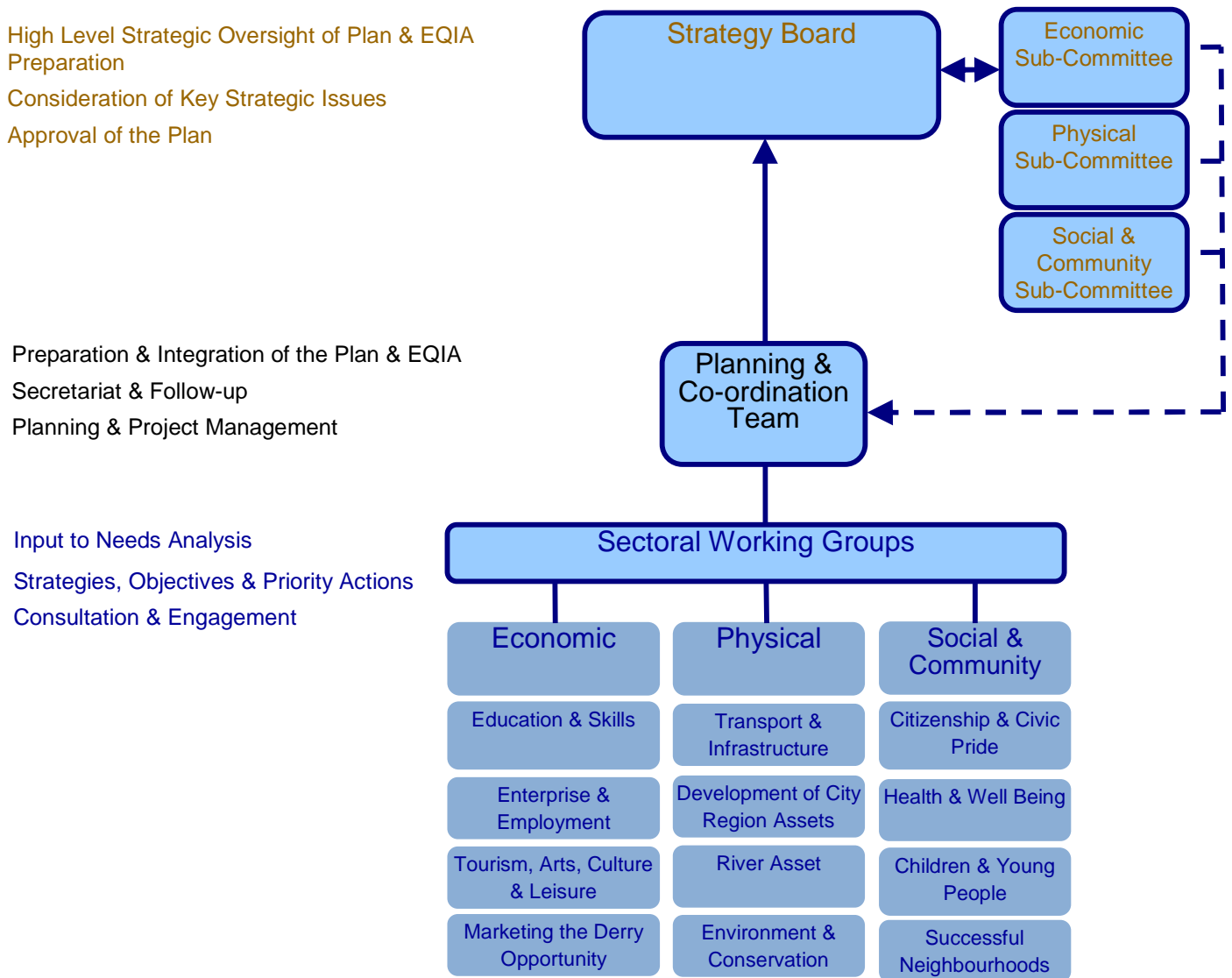
The Regeneration Plan is summarised below:



## Organisational Framework

To deliver the “best regeneration that any city on these islands has seen” an organisational framework, which is designed to bring the best experience and expertise together with imagination and aspiration, to the task has been set up. The Organisational Framework is summarised below:

### Organisational Framework



## SWG Workplan

SWGs are currently scheduled to have 8 meetings. By the end of meeting 5 (by 24th September) it is envisaged that each SWG will have supported the preparation of the EQIA and Regeneration and Investment Plans by:

- drafting a vision statement for the sector;
- reviewing and analysing existing and planned provision and activity in their respective fields and identifying existing inequalities therein for the purposes of ensuring any subsequent proposals can be targeted at fulfilling the statutory duty to promote equality;
- developing an understanding of inequalities within the City and wider region and how these effect, or are affected by, their sector in particular;
- developing an understanding of the economy of the City and wider region, and of their sector in particular, the issues and challenges that are facing it and which impact on economic growth;
- summarising and quantifying the current provision of public, private and community services to their sector as a baseline for the EQIA and Regeneration and Investment Plans;
- considering the roles and responsibilities of all statutory, public, private and voluntary/community sectors in relation to improving the sector including the effectiveness of current policies, strategies, programmes and structures, with a view to identifying elements that work well and should be developed further and those things that could be done more effectively. This analysis will consider all data, and pay due regard to data relating to inequality.
- assimilating quantitative and qualitative data relevant to equality and the sector into a needs analysis of the sector; and
- having given due regard to the existing inequalities and having considered possibilities to promote equality, inputting ideas that have been agreed as viable within the group into a long list of possible interventions and identifying strategies in support of these interventions.

The outline above is extracted from, and expanded in, the SWG Terms of Reference issued in the Launch pack.

## Output

The output of the SWG for this phase of the work (up to and including meeting 5) will be:

- A vision for the sector; and
- A baseline 'needs analysis' for the sector outlining existing inequalities and current levels of service provision and economic activity. This output will be collated with other SWG baseline analyses and the statistics and analysis of the Community Enumerators.

The Vision will complete section 2 of the SWG report output document template issued in the Launch Pack. The needs analysis will provide the basis for Section 3, (Sectoral Analysis), and Section 4, (Key Sectoral Issues) of the SWG Report to the Strategy Board.

Some questions to consider, as outlined on page 3 of the output document template, are as follows:

- *Does the data provided in the background report cover all the key issues? Please update for any gaps or omissions.*
- *Is the SWG agreed on the main challenges and issues facing the sector?*
- *What are the key inequalities within the sector?*

## “Where we are”

### *Key information for Marketing the Derry Opportunity*

This section draws heavily upon the “Regeneration Document for Marketing the Derry Opportunity” produced by Derry City Council.

Derry~Londonderry has embarked on progressing an ambitious strategy and action plan to capitalise upon the uniqueness of the City, its character, vibrancy and its creativity. The aim is to develop an international image, reputation and experience to provide differentiation from competitors.

This coherent brand and place marketing strategy will help articulate a series of unique reasons for living, visiting, working, investing and studying in Derry~Londonderry. It is a partnership programme between the public and private sector and facilitated and funded by Derry City Council, Ilex and Derry Visitor and Convention Bureau.

The strategy has been developed through regular consultation with over 40 stakeholders from the leisure, cultural, retail, investment, business, education and tourism sectors of the City and a further engagement programme with over 100 contributors. The process is almost 80% complete and is moving into the final and most important phase of developing the next steps for implementation.

### *Distinctiveness of City Region*

Marketing the City successfully will require collective resources, effort and direction to assist with improving the City’s capability to retain market share, attract new customers, improve experiences while presenting a single persuasive message to encourage business, visitors, students and leisure customers to live, work, play, study and invest in Derry~Londonderry.

Reshaping the perceptions and experience of key audiences for the City is ambitious and will be successful if delivery is shaped by integration of actions and resources to improve the competitive performance and resources for local and international marketing.

The new brand proposition for the City is based upon five key themes of strength and opportunity. These have arisen from the contributions of many of the sectors and builds upon the work already discussed and developed through Regeneration Plan Mark I.

## Summary

- A City branding campaign to position Derry~Londonderry as a distinctive place to live, work, play, study and invest in is at the design stage.
- The strategy has been developed through consultations with key stakeholders in leisure, tourism, culture, retail, investment, business, and education.
- Marketing the City successfully will require reshaping the experience of key audiences and an integrated marketing approach.
- The branding of the City is based around 5 key themes:
  - Economy
  - People
  - Culture
  - Vibrancy
  - Location
- Effort will be focused on key customers/segments which are cross sector:
  - Day trippers
  - Sightseers/culture seekers
  - Young adults in the North West, NI and ROI
  - Meeting and incentive travelers
  - Trade partners

Table 1: Themes, distinctiveness and description of ambition

The table below outlines the five overarching themes of the Marketing Opportunity and how they will be used to provide a Unique Selling Point (USP) to distinguish and to differentiate Derry from its competition.

| Themes   | Distinctiveness              | Aspiration   | Explanation   |
|----------|------------------------------|--|---|
| Economy  | Growing the “new oaks”       | An economy that is based upon capturing educational talent, promoting entrepreneurship and developing a knowledge based sector to drive the economy.   | The service sector now accounts for over 84% of total employment in the Derry area. With a high level of educational achievement (the number of pupils achieving A*-C grades in GCSEs and progressing to higher education is higher than the NI average), it is hoped that a knowledge based and entrepreneurial economy will be created.   |
| People   | Ireland’s most youthful City | This captures the community spirit, resilience youthful demographic. This statement can be supported through behaviour and proved statistically.   | Derry~Londonderry has a comparatively young population with 28% aged less than 16 years and almost two-fifths (39%) under 25 years. It also has the fastest growing and youngest population in Northern Ireland. <sup>1</sup> This youthful demographic presents opportunities in terms of cultural behaviour and spirit.   |
| Culture  | Being a cultural magnet      | This represents the city’s assets of heritage, history, culture & events. It recognises its importance to the local community as well as for tourists. There is a need to accelerate this aspect of Citylife to build upon strengths whilst developing appeal. | Levels of tourism within the North-West region have been consistently lower than other parts of Northern Ireland. In 2007 there were 149,000 trips to Derry (4.5% of total trips to Northern Ireland) compared with over 883,000 trips to the Causeway Coast and Glens area (28.1% of total trips to Northern Ireland) <sup>2</sup> However, the ‘Derry Tourism Development Strategy 2009-2012’ has set an objective of growing the tourist economy by 8% per annum over the next three years. <sup>3</sup> |
| Vibrancy | Your best night out          | This is the challenge to develop the night time economy for all ages. A City that is dynamic by day and night projects energy, fun and inclusion.  | Catering to the needs of the local community, students as well as tourists in terms of night life and evening entertainment will provide economic benefits.   |

<sup>1</sup> Derry City Council: ‘Economic Development Strategy 2000-2006’.

<sup>2</sup> The Northern Ireland Tourist Board: [www.nitb.com](http://www.nitb.com).

<sup>3</sup> ‘Focus on the Future’: Tourism Development Strategy, Derry~Londonderry 2009-2012.

|          |                              |   |   |
|----------|------------------------------|---|---|
| Location | Centre of a wider experience | This makes the City think about connections and journeys. It encompasses the strength of its hinterland and opportunity to look at partnerships beyond Ireland towards Europe and the UK. | Derry~Londonderry is the 4th largest City on the Island of Ireland and second largest urban centre in NI (108,002 people) and acts as an important economic, transport, cultural and tourism hub with a growing cross border catchment. |
|----------|------------------------------|---|---|

While developing product and experiences to support these themes, the aspiration for standards, quality, appeal and status is driven by the ambition to become “A European Capital Experience.” This can be described as raising the standard of service and quality to the offering found in a comparable European City. To realise a true European Capital Experience is a progressive challenge for Derry~Londonderry, especially under the deliverables of “live, work, rest, invest, play or study.”

A key aspect of the brand challenge is developing a coherent place marketing strategy that develops consumer and business experiences that keep pace with the brand themes that differentiate the City from its competition.

In order to create a more strategic and robust marketing strategy, it has been decided to focus efforts on key segments/customers which are cross sector:

- Day trippers;
- Sightseers and culture seekers;
- Young adults (aged 16-24) in North West area, NI and ROI;
- Meeting and incentive travel;
- Trade partners.

## “What you told us”

### Future Search findings

The Future Search meetings with 120 stakeholders took place to enable large diverse groups within the region to validate a common mission for regeneration, take responsibility for action and develop a commitment to implementation.

Over two and half days 120 key stakeholders were gathered from across a range of sectors in Derry ~Londonderry and summarised below are the key findings from the discussions of relevance to the Marketing the Derry Opportunity.

As the marketing strategy for the City will cut across several themes in its approach to develop an international image, reputation and experience to differentiate it from its competition in terms of living, visiting, investing and studying, an overview of relevant findings from Future Search is presented below.

| Doing   | Want to Do  |
|---|---|
| <ul style="list-style-type: none"> <li>o Arts &amp; Culture → Tool</li> <li>o Major Developments</li> <li>o Walls</li> <li>o Ebrington</li> <li>o Fort George</li> <li>o Health &amp; Wellbeing Including Sport and Arts</li> <li>o Sense of Place</li> <li>o Place Brand → Arts and Culture</li> <li>o People/Environment/Culture/History</li> </ul>   | <ul style="list-style-type: none"> <li>o Place Brand</li> <li>o Ilex / Investment</li> <li>o DCC → Cultural Cluster</li> <li>o Arts &amp; Culture into Investment Programme</li> <li>o Focus on Experience</li> <li>o Continue N.W Challenge Fund For Arts £3 Million</li> </ul>  |
| <ul style="list-style-type: none"> <li>o Equality</li> <li>o Well being</li> <li>o Communications</li> <li>o Establish public values</li> <li>o Utilise public assets</li> <li>o Stimulate private sector</li> <li>o Physical and IT infrastructure</li> <li>o Sustainability</li> <li>o Education and skills</li> <li>o Facilitating economic growth</li> <li>o City role as regional capital</li> </ul> | <ul style="list-style-type: none"> <li>o Joined up thinking and working</li> <li>o Create niche for city</li> <li>o Clarify an identity</li> </ul>  |
| <ul style="list-style-type: none"> <li>o Encouraging and maintaining global businesses in the City</li> <li>o Building the knowledge of future generations</li> <li>o Looking at how we can create an outreach into community – skills/education/jobs</li> <li>o Looking at how regeneration can be an engine for positive change</li> </ul>  | <ul style="list-style-type: none"> <li>o Can't build success without the connection between business, community, education and social</li> <li>o No dependency tackling regional disparities</li> <li>o Effective partnership – business, community, education, social</li> <li>o Effective leadership - One voice for the City~region</li> <li>o How do we ensure effective participation/accountability</li> <li>o IMAGE -PR, media, communication (inside/outside)</li> <li>o Make RPA work for the City</li> <li>o Holding politicians to account – ‘our fair share’</li> </ul> |

| Prouds   | Sorries   |
|--|---|
| <ul style="list-style-type: none"> <li>o Giving a Positive Message &amp; Images</li> <li>o Helping to De-Segregate the City</li> <li>o Keeping jobs &amp; creating jobs in Derry / Investing in Derry</li> <li>o Growing the Tourism Product</li> <li>o Growing a business from the Culture and Heritage of the City</li> <li>o Educating our workforce</li> <li>o Promote Derry Globally</li> </ul>   | <ul style="list-style-type: none"> <li>o We don't give visitors a good (Sunday, Everyday) morning experience.</li> <li>o We are losing jobs from the City</li> <li>o We didn't bring higher quality better paid jobs</li> <li>o Not doing enough workforce skills / education development</li> <li>o Cannot convince Waterside community to work in the Cityside</li> <li>o Not promoted integrated education enough</li> </ul> |
| <ul style="list-style-type: none"> <li>o Draft strategy for all local tour operators available now</li> <li>o Creating a sense of place through branding</li> <li>o Capital investment in arts facilities, signature projects etc</li> <li>o Partnership with City of London</li> <li>o Musical heritage</li> <li>o Job Creation</li> <li>o Nobel laureates and sporting heroes</li> <li>o Self help and resilience</li> <li>o Political leadership</li> <li>o Innovative use of arts in regeneration</li> </ul> | <ul style="list-style-type: none"> <li>o Too many strategies – sorry it took so long for tourism</li> <li>o Misuse of riverfront architectural standards</li> <li>o Demolition of Tilly and Henderson</li> <li>o Confusion over the name of the City</li> <li>o Inward thinking</li> <li>o Lack of recognition</li> <li>o Not making a strong enough case</li> </ul>  |

### Mission Statement

Although the Future Search did not encompass a mission statement for this SWG, the mission statement developed by the group reviewing the role of Derry as the Regional Capital role in the North West seems appropriate:

***“An internationally recognised City-Region harnessing its potential for the betterment of all.”***

During the ‘Action Planning’ theme within the Future Search exercise, some future goals for Derry’s role as the Regional Capital of the North West were identified. These are set out below

### Future goals

| What  | How   | Help  |
|---|---|---|
| <ul style="list-style-type: none"> <li>o Agree catchment area for NW</li> </ul>                         | <ul style="list-style-type: none"> <li>o Agreement</li> </ul>                         | <ul style="list-style-type: none"> <li>o Strabane, Derry~Londonderry</li> <li>o Donegal</li> <li>o Limavady?</li> </ul>                                   |
| <ul style="list-style-type: none"> <li>o Integrated Economic, Social, Physical Strategy/Plan</li> </ul> | <ul style="list-style-type: none"> <li>o Equality Impact Assessment (EQIA)</li> </ul> | <ul style="list-style-type: none"> <li>o Communities</li> <li>o Business</li> <li>o Councils</li> <li>o Government Departments</li> <li>o Ilex</li> </ul> |

Towards A Baseline Needs Analysis

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|   |   |  |
|---|---|--|
| <ul style="list-style-type: none"> <li>o Link community plan with CBD Plan (start process)</li> </ul>                         | <ul style="list-style-type: none"> <li>o Start the process</li> </ul>   | <ul style="list-style-type: none"> <li>o Community Regeneration Forum/ Donegal County Council/Derry City Council/Central Government</li> </ul>         |
| <ul style="list-style-type: none"> <li>o Branding</li> </ul>  | <ul style="list-style-type: none"> <li>o Positive Image</li> <li>o Website</li> </ul>   | <ul style="list-style-type: none"> <li>o Public Sector</li> <li>o Private</li> <li>o Community/Voluntary</li> <li>o Branding Steering Group</li> </ul> |
| <ul style="list-style-type: none"> <li>o Increased awareness of resources and assets</li> <li>o (Link to branding)</li> </ul> | <ul style="list-style-type: none"> <li>o Link to branding</li> </ul>  | <ul style="list-style-type: none"> <li>o Citizens.</li> <li>o Public/Private/Community/Voluntary Sector</li> </ul>                                     |
| <ul style="list-style-type: none"> <li>o Local Champions</li> </ul>   | <ul style="list-style-type: none"> <li>o Strong Leadership</li> <li>o Clarity</li> <li>o Delivery</li> <li>o Accountability</li> <li>o Positive Outcomes</li> </ul> | <ul style="list-style-type: none"> <li>o Derry City Council</li> <li>o County Development Board</li> <li>o Illex</li> </ul>                            |
| <ul style="list-style-type: none"> <li>o Tourism</li> </ul>   | <ul style="list-style-type: none"> <li>o Marketing</li> <li>o Outcome focused not processed focused</li> </ul>  |  |

## “What others have said”

### Factors influencing Marketing the Derry Opportunity

Marketing the Derry Opportunity is a place branding initiative which will guide the type of investment and development that Derry seeks to attract. It will inform the way in which the City markets itself, the image it projects and hopefully, will inspire civic pride and citizenship among Derry people.

Place branding is about identifying the core elements of a city's personality and building on them to develop a sustainable competitive edge to attract and retain people, who will benefit the City's economy and communities. This identity stems from how outsiders see the City and how residents see their own City. Therefore, there should be harmony between these two viewpoints otherwise the city's potential to attract talent, tourism and investment will be undermined.<sup>4</sup>

When there is agreement in terms of a city's sense of place, identity and shared sense of purpose, a greater level of synergy will be achieved. This could inspire a sense of civic pride, which could potentially lead to residents becoming enthusiastic city ambassadors.

Subsequently, it is important that the levels of deprivation experienced in Derry~Londonderry are addressed. Currently, the City experiences a high level of unemployment, educational attainment inequalities and health deprivation. Therefore, it is important that equality of opportunity is provided so that everyone can share in the success of the regeneration of Derry.

### *The Principles of Place Branding*<sup>5</sup>

To understand the range of factors in developing a brand identity and place brand see Appendix A: Figures 3 & 4. Place branding is a strategic approach to consolidate the essential characteristics of the identity of a City into a brand core, and as such 8 key principles have been identified:

1. Purpose and potential - Place branding creates value for a city, region or country by aligning the messages that the place already conveys, in accordance with a powerful and distinctive strategic vision and enhanced international reputation.
2. Truth – A true, full, contemporary picture should be communicated in a focused and effective way which does not compromise nor exaggerate the reality of the place.
3. Aspirations and betterment - A credible, compelling and sustainable vision for future for the place should be created, firmly in the context of our shared future.
4. Inclusiveness and common good - Place branding can and should be used for achieving societal, political and economic objectives.

### Summary

- Marketing the Derry Opportunity will impact the way the City markets itself, the image it projects and hopefully, inspire civic pride.
- Place branding will create a shared identity and culture of the City that will be uniform for both residents and non residents alike.”
- There are 8 principles of place branding which should be taken into consideration for the successful marketing of Derry.
- The key factors that influence the marketing performance of the City are identified as:
  - Knowing your customers & competition
  - Developing an offer that has stand out experience
  - Communicating effectively and in partnership
  - Integrating resources and improving performance
  - Rewarding success

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4 Bristol: A place marketing and marketing strategy

5 Placebrands: Places with purposes

5. Creativity and innovation - Place branding should promote the creative use of skills and talents to achieve innovation in education, business, government, environment and the arts.
6. Complexity and simplicity – Care needs to be taken to balance the richness and diversity of places and their peoples, yet communicate this in a simple, truthful, motivating, appealing and memorable manner.
7. Connectivity - A clear and shared sense of purpose which good brand strategy engenders can help unite government, the private sector, the community & voluntary sector and residents as well as external people and places.
8. Things take time - Place branding is a long-term endeavour which takes time and effort.

#### *Key influences as identified by the Derry City Council and Ilex URC Marketing Audit*

There are a number of factors that influence the marketing performance of the City. These are outlined in more detail in Annex A and summarised below. They build upon the preliminary findings of the Marketing Audit undertaken by Derry City Council and Ilex:

#### **Know your customers & competition**

This is the challenge of choosing “best prospect” customers and establishing market growth targets. The marketing audit indicates that Derry~Londonderry operates in a broad range of audiences/customers. (See Annex A: Table 1, 2, & 3).

It is difficult to compare audiences and market share/size due to non-comparable definitions. For example, a geographical 1.5hr drive radius for culture and retail, GB and ROI for tourism growth, NI and ROI for education and global market for investment. Northern Ireland cities and border regions were identified as the main competitors. (See Annex A: Figures 1 & 2).

There is an opportunity to review the information held and build upon the consumer segmentation information. This will help to understand the scale of opportunity. There is also a need to establish a common segmentation/ product model to assist with choosing “best prospect” consumer/trade choices for short-term and long-term growth. (See Annex A: Table 4).

#### *Develop an offer that has stand-out experience*

This is the challenge of developing the best product/customer match and customer experience. It involves understanding how “best prospects” for consumers and trade engage with the City before, during and post visit. An initial review highlights the need to map the customer journey, understand motivations at each stage and collectively manage the experience to support the brand themes for the City and grow loyalty towards the City as a place in which to live, work, invest, visit, study and play. (See Annex A: Table 5).

#### *Communicate effectively and in partnership*

This is the challenge of building upon partnership working, developing seasonal “call to actions” for consumers and creating strong trade alliances.

The brand programme will develop a framework for communication that helps with consistency and strength of message. There is also a clear need to examine performance and effectiveness of existing marketing and communication channels to identify new approaches by audience rather than sector. As “best prospects” become defined the most appropriate marketing methods to attract and retain this audience for the City should be evaluated. An understanding of the “right” message to the “right” prospect using the “right” methods at the “right” time is

essential. There is an immediate opportunity to increase the frequency of engagement with the NI and ROI market. (See Annex A: Table 6).

*Integrate resources and improve performance*

This is the challenge of aligning financial resources, improving marketing skills and monitoring effectiveness.

There is a variance in the range of marketing spend by sector and an increasing challenge of aligning this investment with the “best prospect” and market potential. It is essential that we can determine a robust return on marketing investment on all activity undertaken.

While performance measures used by each sector varies (footfall, visitor, ticket sales, student numbers, bed-nights, company set-ups and export growth with profile use for retail and events) there is an opportunity to bring performance and investment measurements together to assist with improving decisions and marketing actions.

There are identified common marketing resources for each sector that collectively will help improve understanding of customer needs, improve marketing performance, improve collective purchasing, improve collective working and bring additional resources to influence and expand the experience & marketing activity of the City.

The more Derry moves towards integrating actions the greater the need to identify and resource those common areas of planning and actions that may be provided as a central resource. The implementation of a consistent image, experience and information will require Derry to plan, think, act and deliver services differently. It will ultimately improve skills in marketing and develop centres of excellence and best practice.

*Rewarding success*

The ultimate challenge is to improve marketing performance while creating initiatives that change the perception and experience of Derry comparable to a Capital European Experience. These initiatives must also demonstrate how they can contribute to growing talent and entrepreneurship, capture the community spirit and youthful resilience, accelerate cultural development, create a dynamic city by day and by night, identify connections and partnerships beyond the region. It should help Derry be recognised as a modern, youthful, dynamic and fun City that is confident with moving on and making progress.

## “What others have tried”

In conducting desk research for Marketing the Derry opportunity a range of examples of practice elsewhere were identified:

### *London Development Agency (LDA)*

The London Development Agency helps ensure London continues to protect itself as a leading destination. It offers a vast range of services to the global economy and promotes all of London’s assets: a place to study, visit and invest, with a rich cultural offer complemented by world-class visitor attractions, a business-friendly tax regime and over 42 education institutes. The LDA has developed a range of strategies, projects and agencies to ensure that London markets itself successfully. It manages the brand reputation and image of the City along with growing tourism, education and investment opportunities. While the scale of the City is distinctively different, the functionality and principles of integrating the sectoral work is aligned with Derry~Londonderry’s ambitions.

[www.lda.gov.uk](http://www.lda.gov.uk)

### *Cork Marketing Partnership, Come to Cork.*

Cork Marketing partnership developed a public-private venture to market the region on a European basis as an ideal place to invest, work, visit, live, and for business, investment and tourism. As part of its marketing strategy for business and inward investment, it capitalises on its current pharmaceutical, healthcare, ICT and financial services industry and strategic location as a gateway to Europe. Highlighting the recent €5 billion Docklands regeneration, numbers of graduates from third level institutions and infrastructure investment provides a good incentive for indigenous and foreign investment. Tourism highlights the top 10 City and country attractions, restaurants, local amenities, festivals and information for the local, national and international tourist. The Cork Convention Bureau promotes Cork to national and overseas markets as an ideal destination for business tourism and conferences.

The lifestyle section highlights the vibrant arts and culture scene on offer, local public services (hospitals, universities) and training and employment opportunities. Additionally, a “newcomer guide” in multiple languages encourages and facilitates a transition to work and live in Cork. Within the first year of the Marketing Partnership, the Cork Convention Bureau, the first Cork Christmas Marketing Campaign, as well as the Cork Portal Website and Economic Marketing project were launched. An integral part of the strategy is promotion and projects to position Cork as a vibrant dynamic place including “Cork Better Building Awards” and “Cork City Cares.”

<http://www.cometocork.ie/site/>

## Summary:

- *London Development Agency* – is essential in promoting London as a place to study, visit and invest in using a consistent core brand which allows London to maintain its role as a world class City.
- *Cork Marketing Partnership – Come to Cork.* A public private partnership which capitalises on the resources and assets of Cork to promote it to tourists, businesses and people wishing to come to Cork for work and education.
- *Destination Edinburgh Marketing Alliance (DEMA) – Edinburgh Inspiring Capital.* The agency tasked with creating a unified message that reinforces Edinburgh’s distinctive sense of place on a national and international level.
- *European Cities Network – European Cities Marketing* is the a network of City Tourist Offices and Convention Bureaus from 134 major cities and 32 countries. The alliance facilitates networking on a European basis and exchange of best practice and intelligence.
- *Marketing initiatives and building upon the strengths in Derry.* Build upon previous experience to deliver best European City experience.

### *Destination Edinburgh Marketing Alliance (DEMA), Edinburgh Inspiring Capital*

In 2005 the *Edinburgh Inspiring Capital* was launched to create a unified message to reinforce Edinburgh's distinctive sense of place on a national and international level. A partnership between public, private, and voluntary sectors was created so that synergy and consistency could be achieved in leveraging the region's unique economic, cultural and natural assests. The brand fostered local buy in and civic engagement creating a shared identity among stakeholders. A strong team of committed ambassadors was established by highlighting the benefits of the brand to businesses, brand adopters, residents and those in the tourism industry.

<https://www.edinburghbrand.com/Default.aspx>

### *European Cities Network*

European Cities Marketing is a network of City Tourist Offices and Convention Bureaus from 134 major cities and 32 countries. The alliance facilitates networking on a European basis, exchange of best practice and intelligence, and pan-European marketing initiatives and e-commerce. By providing an opportunity for partnership, members can see other European Cities not only as competitors but also collaborators achieving common interests and objectives.

<http://www.europeancitiesmarketing.com/>

### *Marketing Initiatives and building upon strengths in Derry*

Derry has already pioneered marketing initiatives that have led the way in new markets, new products and experiences for attracting and retaining business. Moving forward, it is important to build upon these areas of best practice, skills and knowledge in line with best European City experience. The implementation of these new initiatives must deliver on the proposed strategic place marketing objectives and align to the new brand themes to represent distinctiveness and develop a competitive edge for the Derry~Londonderry.

## Key questions/issues for SWG to consider

- Has a coherent identity/personality been identified for Derry? Has a logo/slogan been developed?
- What are the core characteristics of Derry and what should they be? How will these be truly understood throughout the City and beyond?
- How can Derry~Londonderry project itself externally to inspire people and attract investors, students, businesses and visitors? How can this be achieved while at the same time not alienating residents?
- What does successful marketing mean to the various components of this sector?
- Who are the “best prospects/customers”, the attraction of whom will make a positive difference to the sector?
- What are the most appropriate marketing/promotion/communication tools?
- How would you improve communication within the sector?
- How would you shape the product, experience and communication to deliver European stand out experience?
- How to recruit and encourage ambassadors for the City?
- How will the marketing initiative ensure best use of resources in marketing the City?
- How can we ensure consistency in the messages in all City communications, marketing materials and techniques? How will stakeholders be supported so that there is a wide understanding of values and themes so that synergy is created?
- What lessons can be learnt from Place making and branding initiatives in other cities?
- How will the objectives of the other SWGs align with the objectives of Marketing the Derry Opportunity?
- What partnerships need to be created and fostered on a regional, national and international level to market the City successfully?

### Summary:

- The key issues for the SWG to consider include:
- Identity;
- Core characteristics;
- Balance;
- Message delivery;
- Best use of resources;
- Lessons learnt from other cities;
- Cohesion;
- Consistency;
- External Partnerships.

Annexes:

Sectoral Background Paper  
Marketing the Derry Opportunity

## Annex A: Baseline statistical tables

Table 1: Profile segmentation for Derry~Londonderry

| Segment                                      | Profile   | Sector                                   |
|--|---|--|
| Day trippers<br>Shoppers and event attendees | Families with children under 10<br>Families with teenage children                   | Culture<br>Retail<br>Heritage            |
| Sight seers and culture seekers              | 50+ couples in ROI and GB<br>People living within 3 hour drive of Derry~Londonderry | Tourism<br>Culture                       |
| Young Adults                                 | 16-24 living in North West, NI and ROI  | Retail<br>Culture<br>Education           |
| Meeting and Incentive Travel                 | Conference organisers   | Hotels and retail                        |
| Trade partners                               | Buyers, investors, ambassadors, investors and travel industry.                      | Hotel<br>Retail<br>Culture<br>Investment |

The table above provides an overview of the key market segment, customer profiles and the various sectors that will benefit from their custom.

Table 2: Summary of existing customer by sector

| Sector     | Market opportunity   |
|------------|--|
| Leisure    | Limited Information available  |
| Retail     | Supermarket shopping: Tesco & Sainsbury account for 60% of the trade from cityside and waterside and supermarket shopping is also important to central City zone<br>Comparison shopping: City centre has a high market share in the City 49.7% but has leakage to Omagh & Strabane. It attracts more than 34.5% of NE Donegal<br>Related activities: Less than a quarter of consumers mentioned shopping combined with another leisure activity<br>(source Retail Strategy)  |
| Tourism    | Day trippers and Shoppers : (local, regional and cross border)<br>Sightseers and Culture Seekers : (GB & overseas)<br>Leisure tourist : (home and close to home)<br>B2B Business tourism: (all markets)<br>(source Tourism Strategy)   |
| Investment | UK, European and American: ICT; Telecoms and electronics; Financial services & Software companies<br>(source INI website)  |
| Culture    | Mosaic analysis of database of event registration. 77% Northern Ireland and 15% ROI (predominantly Donegal). The mailing list has a diverse range of people with a catchment area of 30 minutes drive radius. Of the Northern Ireland group, 74% DCC area with Strabane 8%, Limavady 4%, Belfast 2% and Omagh 1%.<br>Mosaic Type: Diverse range of people on the database: 24% married couples/empty nesters, approaching retirement; 15% young families with children (lower income); 13% married couples with children (higher income); 12% young married couples with children (nest makers under age 45); 11% Farming communities or rural;<br>(Source DCC mosaic analysis of events database) |

|           |   |
|-----------|---|
| Education | North West Regional College: 24,500 full-time, part-time and evening learning students from the region<br>University of Ulster at Magee: 3800 students<br>18-24 age group dominant, with UU providing further research opportunity<br>(Source: Inews letter and UU website) |
|-----------|---|

The marketing audit indicates there is a strong reliance on the local and Donegal market for retail and culture. The education sector also operates in this geographical area. The tourism market is primarily ROI and UK based with a steady growth in the European market. These markets are also important for education. The investment market is also focussed on UK & Europe with a global approach for niche sectors. The Product/Market matrix in Table 3 supports this.

**Table 3: Product/ Market matrix**

This summarises the positioning of existing customers and products and suggests new product/experience ideas that may stimulate market growth.

|                   | Local                                      | Regional                                     | International                             |
|-------------------|--|--|---|
| New Products      | Evening economy development & niche retail | Events<br>Education specialism<br>Conference | Direct air access<br>Centre of excellence |
| Existing Products | Retail<br>Culture/Events<br>Education      | Tourism<br>Education<br>Investment           | Tourism<br>Investment                     |
|                   | Existing Markets (Local/Donegal)           | Growth Markets (ROI and GB)                  | New Markets (Europe)                      |

**Table 4: Summary of best prospect consumer and trade segment for the City**

This table summarises the key market consumer and trade segments, the sectors they appeal to and the opportunities for market growth that may be considered. There is also a substantial gap in the statistical information and model for developing choices.

| Segment "best prospect"  | Sector/product this segment appeals to  | Growth opportunity   | Info gaps   |
|--|---|--|---|
| Day Trippers; Shopping & events. This is the home, NI and regional market with a 1.5hr drive time        | This segment is important for culture, retail and heritage. The local market is a core market for retail and culture. Families are a strong characteristic of the local market. | Opportunity to increase reasons to visit through regular and value special offers. | Profile type;<br>Size of Market;<br>Spend profile ;<br>Competition. |
| Sightseers and Culture Seekers<br>ROI and GB market<br>Short Break. This is primarily through direct air | This segment is important for tourism and culture.  | Opportunity to increase short breaks by extending season linked to events          | ROI profile;<br>Size of market;<br>Spend profile;<br>Competition.   |

|   |  |  |  |
|---|--|--|--|
| access UK and Ireland and 3 hour drive time |  |  |  |
| Young Adult 16 – 24<br>Local, NI and ROI    | This segment is important for retail, culture and education  | Opportunity to build the experience/appeal of the City to this age group                             | Market size<br>Consumer needs,<br>Consumer spend |
| Meeting and Incentive Travel                | This segment is important for hotels and retail.   | Opportunity to build upon conference interest in area and targeted groups where direct access exists | Size of market (Local and UK)                    |
| Segment “best prospect”                     | Sector/product this segment appeals to   | Growth opportunity   | Info gaps  |
| Trade Partners                              | This includes buyers, investors or ambassadors. It includes coach tours, cruise ships, tour operators, investors & referring agents. | Opportunity to resource joint trade events to build upon experience and connections in this sector   | Scale of market opportunity                      |

Table 5: Mapping the Customer Journey

This area identifies a challenge to evolve products into experiences that compare with the best in Europe. Understanding what this means in practice for both “best prospect” consumers and trade and how this may influence their engagement with the City before they arrive, during their stay and aftercare is an area that needs to be defined, researched and progressed. While the marketing audit shows a reasonably high investment in customer care training, there is a distinct lack of co-ordination across sectors for the complete customer experience.

One method of understanding the experience of the consumer is to use the journey methodology. The following sample journeys set out the challenge to understand the steps and motivations at each stage to help the City compete and manage the experience of a modern, youthful, talented and fun City and region.

**Please note: Sample journeys are detailed overleaf for illustrative purposes only**

|  |   |   |   |
|--|---|---|---|
| <b>Journey</b>                         | Day Visitor from Coleraine with two teenagers   | Student age 17 from ROI looking for third level education   | IT Company looking for partners   |
| <b>Unaware</b>                         | Word of mouth<br>Something they read/heard about  | Career Advisor<br>Web site search   | Searches website<br>Specialist publications   |
| <b>Awareness Targeted and personal</b> | Received a direct mail with special offer for teenagers at unique fashion event   | Received a leaflet through school for opportunities and invitation to graduation week                 | Attends trade show and meets a specialist in IT locations for the City  |
| <b>Action</b>                          | City website & information centre for booking special offer   | City website and information to view final year graduation showcase and event                         | Signs-up for a familiarisation visit or to speak with a successful company from the area  |
| <b>Visit</b>                           | Arrived on a Thursday for late night shopping meal, fashion event, interactive street performers                              | Arrives with parent and friend, family hotel, visit showcase and attends event, meets other students  | Arrives with partner, stay at hotel, City visit and meets with other investors, receives documents on best investment locations |
| <b>Post-Visit</b>                      | Journey home and local radio commentary. Next week letter of thanks for visiting come again soon, gathers profile information | Returns home and receives by email, thank you and information for helping to choose Derry~Londonderry | Returns home and receives a follow-up call to see what location advise can be provided  |
| <b>Result and next step</b>            | Signs up for database<br>Becomes a referrer   | Puts City down as choice  | Second visit arranged and support offered to work through business case and plan  |
| <b>Journey continues</b>               | Next visit and thereafter   | Arrives as student and experience   | Company begins partnership negotiations   |

Table 6: Frequency of Sector Promotional Activity by Geography

| Geography  | Local | NI | Donegal/ROI | GB | Europe/Other |
|------------|-------|----|-------------|----|--------------|
| Sector     |       |    |             |    |              |
| Retail     | 3     | 2  | 2           |    |              |
| Culture    | 3     | 2  | 2           |    |              |
| Tourism    | 1     | 2  | 2           | 2  | 1            |
| Education  | 1     | 1  | 1           |    | 1            |
| Investment |       |    | 2           | 2  | 2            |

- 1- Limited Activity (Annually)
- 2- Regular Activity (seasonally more than twice a year)
- 3- Very Active (monthly)

The local promotional activity is driven by retail and culture with regular “calls to action” to shop or take part in cultural activities. NI promotional activity is based on seasonal call to actions around Christmas, events and summer programmes. The Donegal/ROI is more campaign/season based with calls to action through Christmas or Euro (€) campaigns, new season brochure/event promotion, short-breaks, business-to-business meetings and enrolments within higher further education.

Figure 1: Tourism development in the North West region<sup>6</sup>

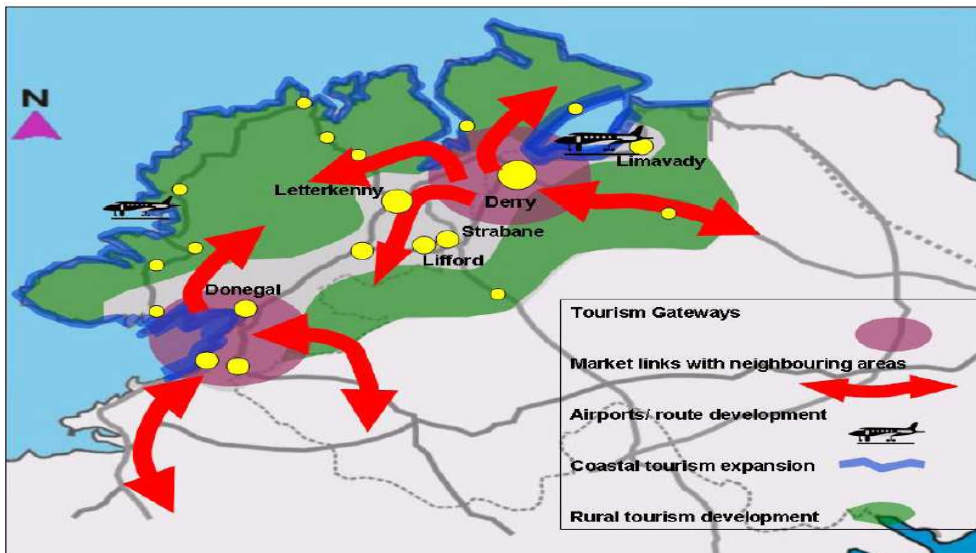


Figure 2: The Spatial Development Strategy for Northern Ireland<sup>7</sup>



Figure 1 and Figure 2 above demonstrate the potential throughput and gateways that Derry could avail of in terms of tourism (Figure 1) and the level of infrastructure that connects Derry to other towns and cities in Northern Ireland (Figure 2) which highlights the potential geographically based “best prospects.”

<sup>6</sup> Source: North West Gateway Initiative Spatial Framework Draft Final Report May 2007

<sup>7</sup> Ibid

Figure 3: Conceptual model of place branding and Brand identity<sup>8</sup>

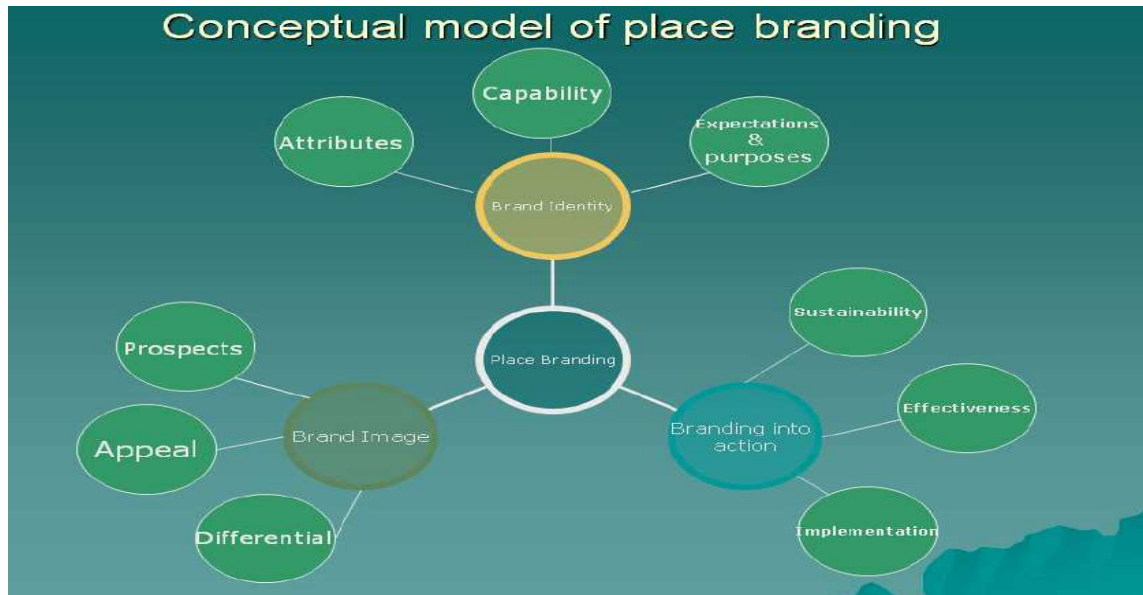


Figure 4: Brand identity<sup>9</sup>

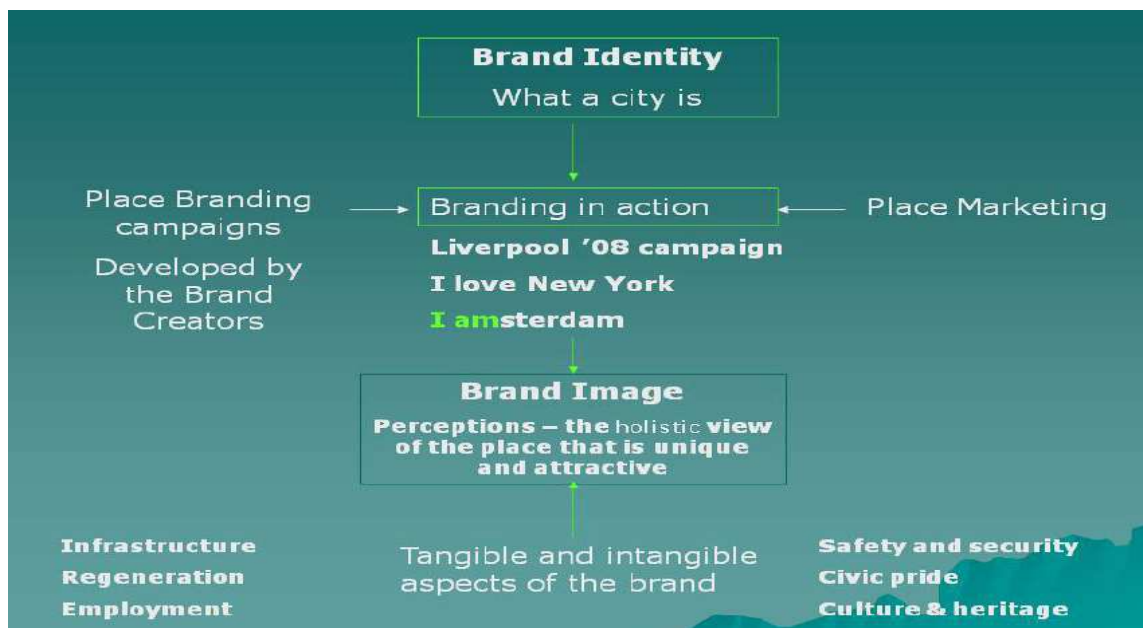


Figure 3 & 4 above demonstrate the interconnecting influences on brand identity which will be important to consider to ensure a connected and consistent brand is developed for Derry~Londonderry.

<sup>8</sup> Maheshwari, 2008

<sup>9</sup> Ibid.

Annex B: “Where we fit?”

### **Strategic Objectives: Marketing the Derry Opportunity**

The strategic objectives as identified in the draft marketing strategy designed by Derry City Council are outlined below:

- Further define the existing market segments to understand scale of opportunity and to develop Segmentation/Market models to assist with “best prospect” choices in short-term growth and long-term growth markets. This should assist with extending the season and expanding the peak performance months for each sector.
- To map and understand customer journeys and referral points to understand the unique service and experience difference that will make the City out perform its competitors, retain and grow business.
- Ensure that the brand programme is used to wide scope and consistency of message so that all campaigns/communications have a common starting point.
- Examine performance/effectiveness of chosen channels and develop new communication/marketing approaches based on the audience rather than by sector.
- Increase the level of partnership activity in the NI/ROI market for retail, culture and tourism promotion from a level 2 to 3 (See Annex A: Table 5). This would provide for a monthly call to action for short-breaks, day/evening visits.
- Explore the opportunity for partnership working and improving trade alliances in UK and Europe.
- Explore the shared marketing services model to assist with delivering common marketing actions through a central resource. It will assist with growing knowledge and developing a centre of excellence for marketing.
- Establish a cost effective and consistent approach for measuring change and planning collectively.

Additionally, it is important that the Marketing the Derry Opportunity SWG refers to the objectives of the other SWGs, in particular:

- Education and Skills;
- Enterprise and Employment;
- Tourism, Arts, Culture and Leisure;
- Transport and Infrastructure;
- Development of the City Region Assets;
- Citizenship and Civic Pride;
- Successful Neighbourhoods.

As the SWG is responsible for the marketing of the City as a unique place to live, visit, work, invest and study it is vital that there is consistency in the aims and objectives of these groups and how they are communicated to residents and outsiders.

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