



IRELAND'S  
HIDDEN HEARTLANDS  
**REGIONAL**  
TOURISM DEVELOPMENT  
STRATEGY 2023 - 2027







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A map of Ireland with county boundaries outlined in white. A central group of counties is highlighted in a yellow-green color. The highlighted counties are: Leitrim, Cavan, Roscommon, Longford, Westmeath, Galway, Offaly, Clare, Tipperary, Limerick, and Cork. Other counties shown in a lighter green are Mayo, Monaghan, Meath, Kildare, Laois, and Wicklow.

# EXECUTIVE SUMMARY

Mayo

Roscommon

Leitrim

Cavan

Monaghan

Longford

Westmeath

Meath

# EXECUTIVE SUMMARY

Galway

Offaly

Kildare

Laois

Wicklow

Clare

Tipperary

Limerick

Cork

## EXECUTIVE SUMMARY

The Ireland's Hidden Heartlands Regional Tourism Development Strategy 2023 – 2027 is a roadmap for the tourism industry and all stakeholders involved in tourism in the region to navigate the current challenges and steer a course towards a sustainable recovery and continued success. The plan sets out a strategic approach to unlocking the commercial potential of Ireland's Hidden Heartlands. It will ensure focus on tourism development is sustainable and regenerative and that the benefits accrue to local communities and to nature.

The strategy has been prepared during a time of unprecedented uncertainty. Despite having weathered the disruption caused by Brexit and COVID-19, the industry is now facing into an energy crisis of unprecedented scale resulting in further uncertainty.

The Regional Tourism Development Strategy 2023 – 2027 is primarily informed by the Government's Tourism Strategy People, Place and Policy: Growing Tourism to 2025, Fáilte Ireland's Corporate Strategy 2021-2023 and the report of the Sustainable Tourism Working Group Actions to Promote Sustainable Tourism Practices 2021-2023. The Strategy is also informed by planning policy (the National Planning Framework, the Regional Spatial and Economic Strategies and lower tier plans).

## THE CONTEXT

The Ireland's Hidden Heartlands brand was launched in 2018 to provide the Midlands with a distinct and compelling tourism proposition. Since its launch it has been very well received by both visitors and industry alike. It has strong brand adoption by tourism businesses and a 47% brand awareness rate among domestic visitors in 2019. In the same year, tourism in Ireland's Hidden Heartlands was worth €307m (€178m from international visitors and €129m from domestic visitors) supporting approximately 8,000 jobs. Nationally, in 2019 Ireland's Hidden Heartlands had a 4.1% share of overseas visitors and a 6.7% share of domestic visitors. Participation by tourism businesses from the region at Meitheal, Ireland's leading tour operator trade event, rose from 8 in 2018 to almost 40 in 2022.

## THE CHALLENGE

Ireland's Hidden Heartlands is still at an early stage of maturity as a tourism destination but with distinctive natural and cultural assets and a strong community base.

The strategic challenge is to increase domestic and international awareness and consideration of Ireland's Hidden Heartlands as a distinctive region and to support the industry in sustainably leveraging the abundance of available natural and cultural assets to develop compelling visitor experiences that meet and exceed visitors' expectations, resulting in increased visitor revenue and local jobs, while protecting the unique environment of the region.

## OUR AMBITION

Our ambition for this strategy is to drive recovery and growth of the visitor economy in Ireland's Hidden Heartlands to create sustainable, high-quality jobs that will support and strengthen local communities while protecting our natural environment. This will be achieved by raising awareness and consideration of the region as a visitor destination and increasing the average length of stay. In doing so, we will redefine tourism success based on our sustainability goals.

While 2022 is a strong year due to pent-up demand and deferred bookings from the previous two years, 2023 and beyond are expected to be more challenging. Forecasting the rate and pace of recovery and growth is difficult but at a minimum we expect a return to 2019 levels of revenue by 2026, in inflation adjusted terms, with an ambition to exceed this.

We also expect an additional 5% supply side capacity (accommodation, visitor attractions, activity providers, etc.) to come on stream over the period of this strategy, which would be achieved through optimising existing assets (e.g. longer opening hours) as well as developing new stock.

It is Fáilte Ireland's long-term objective to ensure a greater regional spread of the socio-economic benefits of tourism across the country. For the Hidden Heartlands, this means growing tourism revenue at a faster rate in areas that are less visited relative to the more popular destinations nationally over the period of this strategy while staying



within existing infrastructural and environmental capacities. While the short-term focus is on recovery in all areas, as the recovery progresses, we will set more specific regional targets which will be considered at the mid-term review of this regional tourism development strategy.

### THE 10-YEAR VISION

**It's 2032 and Ireland's Hidden Heartlands is one of Europe's leading regenerative tourism destinations (top 10 ranking), a place where tourism works to create flourishing places and thriving communities.**

The region has become well known as a sustainable destination where visitors can reconnect with nature while taking time out to reconnect with family and friends. With the River Shannon and the Beara Breifne Way at its heart, and a well-connected web of Greenways and Blueways spread throughout the region, this is a place where nature is the backdrop to a wide range of compelling visitor experiences, from outdoor activities to uncovering intriguing heritage and cultural gems that continually surprise and exceed visitors' expectations.

Active fun-filled days roll into relaxing, cosy evenings in historic hotels and lakeside lodges. Its characteristic towns and villages are vibrant and bustling with great restaurants and musical pubs. The region, which is highly valued for its special environmental qualities and biodiversity and its easy access to the outdoors, has also earned a reputation for its wellness qualities, where the visitor is re-energised by nature.

### DISTINCTIVE DESTINATIONS



Source: Fáilte Ireland.

## STRATEGIC APPROACH

The Ireland's Hidden Heartlands Regional Tourism Development Strategy will achieve a new vision for tourism in the region by focusing on the following strategic objectives:

**STRATEGIC OBJECTIVE 1:** Raise awareness and recognition of the region and brand among domestic and international visitors and increase the duration of visitor stays, particularly within the domestic market.

**STRATEGIC OBJECTIVE 2:** Enhance the range and quality of our visitor experiences to underpin the Hidden Heartlands brand proposition, leveraging the natural and cultural assets of the region in a sustainable way with a focus on eco-tourism.

**STRATEGIC OBJECTIVE 3:** Grow the economic impact of tourism and create jobs in local tourism by supporting the tourism industry (private, public and community sectors) to develop its capacity and capability while reducing its carbon footprint.

**STRATEGIC OBJECTIVE 4:** Establish the region as one of the leading regenerative tourism destinations in Europe in which tourism results in net positive outcomes for communities and nature.

**STRATEGIC OBJECTIVE 5:** Build a committed industry and stakeholder coalition to guide and co-ordinate the sustainable development of destinations across the region.

The following paragraphs outline how we will work collectively to achieve the opportunity presented by tackling the challenges that face the sustainable development of the region.

## SUSTAINABILITY, CLIMATE ACTION AND BIODIVERSITY

The principles of sustainable tourism have been placed at the heart of this Regional Tourism Development Strategy through the adoption of the VICE model. Sustainability in tourism demands rethinking tourism success and main-streaming sustainable tourism policies and practices.

For Ireland's Hidden Heartlands, a key sustainability challenge will be to facilitate the recovery and growth of tourism from a relatively low base. It will operate well within environmental capacities and

ensure tourism activities do not impact negatively on ecosystem services, sensitive environments, habitats and species. Given that the tourism offering is largely based on the natural and built heritage, it is crucial that the quality, character and distinctiveness of these assets are protected. We will also place a particular emphasis on the development and promotion of eco-tourism experiences.

De-carbonising the tourism sector is a key priority of this strategy. Fáilte Ireland is committed to working towards ensuring that the tourism sector plays its part to help deliver Ireland's commitments under the Paris Agreement on Climate Change, as set out in the **Climate Action Plan 2021**. Fáilte Ireland will adhere to these plans during the lifetime of this strategy.

A particular emphasis will be placed on regenerative tourism within this strategy. While regenerative tourism shares the same basis as sustainable tourism, it focuses also on the potential regenerative effects of tourism on local communities and nature and is prompted by the challenges being addressed throughout the region by the Just Transition programme. It is an objective of this strategy to establish the region as one of Europe's leading regenerative tourism destinations over the next 10 years.

## VISITOR STRATEGY

The visitor strategy for Ireland's Hidden Heartlands for the domestic and overseas markets will focus on raising brand awareness and growing visitor intent to take a trip to the region. The overall strategic approach will be to position Ireland's Hidden Heartlands for domestic families and unconstrained adults as an easy to access, surprising and tranquil region. It will focus on fun, nature-based holidays and breaks where the visitor delights in discovering hidden cultural and heritage gems. There will be a focus on the visitor motivations of Bonding with family, Social Energy, Time Out and Adventure directed at a combination of families and young unconstrained adults, <45 years).

Internationally, Ireland's Hidden Heartlands will be positioned by Tourism Ireland to appeal to the Great Escaper's and Culturally Curious market segments in our four main source markets.



## DESTINATION DEVELOPMENT

Over the course of this strategy, in addition to one Destination and Experience Development Plan (DEDP) that already exists, four DEDPs will be prepared for destinations within the region:

1. Lough Derg (Tipperary, Clare & Galway) – launched 2021.
2. Upper Shannon, Shannon Erne & Border (North Roscommon, Leitrim & Cavan) – commence 2022.
3. Mid Shannon & Midlands (Westmeath, South Roscommon, Longford & Offaly) – commence 2023.
4. East Galway – commence 2023.
5. Ballyhoura – commence 2023.

The purpose of the DEDPs is to co-ordinate all tourism development activity in a destination around a single five-year vision which is prepared and owned by both public and private sector stakeholders. This Regional Tourism Development Strategy provides the overall strategic framework for each of the DEDPs in the region. Each DEDP will also be subject to environmental assessment as relevant.

## PRODUCT DEVELOPMENT

The product development focus will be on sustainably building out the range and quality of visitor experiences, with a strong emphasis on eco-tourism. We will focus on the implementation of the Shannon Tourism Masterplan, the further development and promotion of a network of walking, cycling and water trails, including the Beara Breifne Way, the Royal and Grand Canal Greenways, and the Dublin-Galway Greenway. It will include the preparation of a trails strategy for State-owned lands, creating a new scale of connectivity linking towns and villages with activity providers and regional cultural and heritage gems.

There will be an increased focus on improving the visitor experience and commercial performance of existing visitor attractions and experiences, both public and private.

The focus for the accommodation sector will be on improving the existing hotel offering, developing a wider range of small scale, eco-friendly alternative accommodation, and bringing the large stock of unregistered accommodation into the registration system. The development of camping and better facilities for motor-homes and exploring ways to renew the B&B sector will also be activated. Angling, golf and food will be a focus for development and promotion.

We will leverage the opportunity provided by the Just Transition Fund to ensure that tourism plays its part in delivering on the objectives of the Just Transition programme in the region.

## COLLABORATION

The key to the success of this strategy will be how well each of the various partners collaborate in delivering on its objectives. These partners include the tourism industry, Local Authorities, State agencies, the private sector and community groups. The strategy will require close collaboration with the Wild Atlantic Way and Ireland's Ancient East regional teams.

This will result in the development and promotion of touring routes and itineraries to encourage new visitor flows and open up opportunities for less-visited destinations. Cross-border collaboration will also be a key feature of this collective approach, particularly the development and promotion of the UNESCO Cuilcagh Lakelands Geopark, Ireland's only cross-border Geopark and the development and promotion of the Shannon-Erne Waterway.

## INDUSTRY CAPACITY & CAPABILITY

One of the most important parts of this strategy will be to support our tourism providers with the skills they need to navigate an uncertain operational environment and to be prepared to seize the opportunity when it presents itself. In recognising the challenges facing the industry in terms of labour shortages and rising input costs, we will deliver supports in a number of ways. These include Account Management, Network and Cluster Development and the implementation of National Support Programmes.

Effective business networks are the hallmark of any successful destination. Given that the region is still at an early stage of maturity as a destination, there will be a particular and sustained focus over the period of this strategy on the development of cross-county, commercially focused business networks and clusters across the region.

The community-based tourism enterprise sector is particularly important for this region, representing a significant proportion of our visitor experiences. These enterprises deliver a wide range of economic, social, cultural and environmental benefits, as well as ensuring a highly authentic experience for our visitors. We will focus on supporting this sector across areas such as commerciality, governance and succession planning.

We will build on the success of the Hidden Heartlands Website Improvement Programme between 2019 and 2021, which delivered transformational digital change for 40 businesses in the region. We will continue to work with the industry in ensuring their improved digital capability and the delivery of a transformed digital shop window for the region through the Digital That Delivers Programme.

The significant challenges faced by tourism businesses over the next five years to reduce their CO<sub>2</sub> emissions will also be addressed. Fáilte Ireland will work with a number of other State Agencies, such as SEAI, and industry groups to support the industry in reaching its carbon reduction targets. We will also support the uptake of sustainability measurement and certification programmes at both enterprise and destination levels.

Sales and Distribution Plans will be prepared for each DEDP in Ireland's Hidden Heartlands based on the maturity level of each destination. The focus of the Distribution Plans will be to build on existing progress made with the domestic market and to establish a foothold in key overseas markets, particularly GB, USA, France and Germany. Support will be provided to businesses to help shape their products for different distribution channels and build their sales and contracting skills in advance of engaging buyers.

## COMMUNITY

Local communities are at the heart of any successful visitor destination so this strategy will ensure that tourism works to benefit local communities across Ireland's Hidden Heartlands. We will continue to build on the goodwill towards tourism within local communities in the region by ensuring they are involved in all decisions that could impact them.

We will engage with local communities in relevant interpretation projects that involve their local heritage and culture, in association with other relevant agencies and bodies. It will create opportunities for local communities to present and share their own culture, traditions and heritage with visitors to their area.

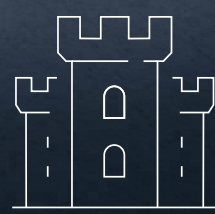
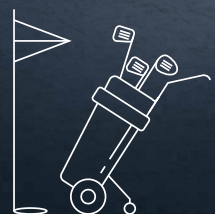
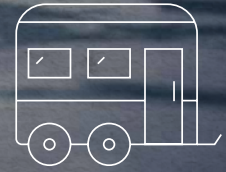
## ENVIRONMENTAL PROTECTION & PROMOTION

The protection, enhancement and promotion of our most important tourism asset, the natural environment, has been an integral part of the formation of this strategy.

The potential impacts on the environment that could arise from implementing this Regional Tourism Development Strategy have been fully assessed through a Strategic Environment Assessment and an environmental monitoring programme has been established to monitor any impacts that might arise over the course of the strategy period.

It is imperative to ensure the conservation and maintenance of key elements of biodiversity as part of any development projects to ensure they do not contribute to biodiversity losses or deterioration. Integrating requirements for environmental protection and management form a core part of this approach.









A map of Ireland with county boundaries outlined in white. A central group of counties is highlighted in a yellow-green color. These highlighted counties are Leitrim, Cavan, Roscommon, Longford, Westmeath, Galway, Offaly, Clare, Tipperary, Limerick, and Cork. Other counties shown in a lighter green background include Mayo, Monaghan, Meath, Kildare, Laois, and Wicklow.

# 1. INTRODUCTION AND CONTEXT – ABOUT THIS STRATEGY



## 1.1. REGIONAL TOURISM DEVELOPMENT STRATEGY OVERVIEW

This Regional Tourism Development Strategy represents a 10-year vision for the sustainable development of tourism in Ireland's Hidden Heartlands, together with a 5-year strategy to guide the achievement of that vision. It identifies the elements required at a strategic level to unlock the commercial potential of the region while protecting the environment, enhancing the lives of local communities and exceeding the expectations of our visitors.

It is intended that this strategy will be the blueprint for sustainable tourism development in the region ensuring our stakeholders and partners can work together towards a shared vision. It provides a guiding strategic framework for other more detailed tourism development plans that will be prepared within the region over the next five years. These include, Destination and Experience Development Plans (DEDPs), County Tourism Strategies and the tourism sections of County Development Plans. The strategy will also help identify priorities for available funding in the region, e.g. URDF, RRDF, and Just Transition.

Central to this strategy is a new approach to destination development which recognises the issues and challenges facing a destination are linked to its level of maturity. This requires destination development plans to be nuanced to reflect the needs and opportunities in each destination. It will ensure the correct type of interventions and supports for the destination are triggered and development is sustainable, relevant and successful for the destination.

In general terms, the entire Hidden Heartlands region is at a relatively early stage of development as a tourist destination. The brand itself is still in its infancy with a lot of work required to raise awareness of it among key target markets.

Developing destinations is complex and multi-faceted with a myriad of different stakeholders involved with a wide range of touchpoints that impact on the quality of the visitor experience.

When all of these stakeholders work together towards a single vision, great destinations are created. Among the many elements that constitute

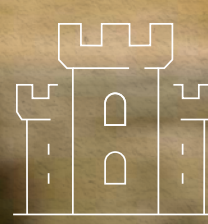
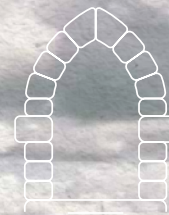
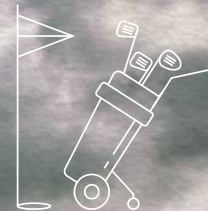
a great destination include the core motivators from visitor attractions, activities, accommodation base to visitor facilities and services.

The destination experience is further enhanced by the quality of its physical and digital infrastructure and the quality and accessibility of its landscapes, towns and villages. Attractive destinations for visitors are first and foremost high quality environments and great places to live and work for locals.

Fáilte Ireland consulted widely with industry and stakeholders in preparing this Regional Tourism Development Strategy. As part of the process, 146 industry partners from across the region responded to a survey to help identify the key challenges facing the sustainable development of Ireland's Hidden Heartlands over the coming years. Fáilte Ireland has also taken into account the findings of the Strategic Environmental Assessment (SEA) which are detailed in the accompanying SEA Environmental Report.

Bord na Móna have, in recent years, permanently ceased industrial peat production on a significant area of bog in the region. An EU Just Transition Fund has been established for the period 2023-2026 to rehabilitate cutaway bog and to assist local communities to transition to a low-carbon economy. The EU Just Transition territory for Ireland includes the following areas within Ireland's Hidden Heartlands: Counties Roscommon, Longford, Westmeath, Offaly and the Ballinasloe Municipal District of Co. Galway. Fáilte Ireland has been awarded a portion of this funding for the establishment of a Regenerative Tourism Scheme, which will be administered in line with the overall objectives outlined in this regional tourism development strategy.







## 1.2. IRELAND'S HIDDEN HEARTLANDS AND SUCCESS TO DATE

The Ireland's Hidden Heartlands brand was launched in 2018 in response to a need for a distinctive tourism brand proposition for the Midlands that was differentiated from both the Wild Atlantic Way and Ireland's Ancient East. While still very much in its infancy, the brand has gained traction since its launch in the domestic market and overseas markets. The brand proposition has researched very positively across all key source markets, being both of interest to visitors and a compelling motivation to travel. In 2019, awareness of the Ireland's Hidden Heartlands brand among domestic visitors had grown to 47%. It has also resonated well with local communities and industry partners who have identified with it. There has been strong brand adoption in the industry from the outset.

The brand serves to galvanise the industry around a shared proposition and the region is seeing a welcome increase in the rate of private investment in the tourism product and accommodation. Investment includes Center Parcs; CABU in Co. Cavan; a new visitor centre at The Shed Distillery in Drumshanbo, Co. Leitrim; and Glasson Lakehouse in Co. Westmeath, reflecting an optimism around the tourism potential of the region. The number of saleable experiences transacting with both domestic and international tour operators has increased significantly since the launch of the brand. This is reflected by the number of industry attendees at Meitheal, growing from 8 in 2018 to over 50 in 2022.

Shortly after the brand launched, Center Parcs opened its first property in Ireland, establishing an iconic attraction in Longford attracting visitors from all parts of Ireland. The resonance that exists between Center Parcs and the Hidden Heartlands brand has served to strengthen the reputation of the region as a great destination for active and fun outdoor experiences.

Public investment in tourism related infrastructure is also flowing into the region through the RRDF, URDF and ORIS. In particular, for the creation of recreational infrastructure which underpins the brand proposition of 'active in nature'. All nine Local Authorities have been very successful in securing this funding with the industry and communities responding by creating saleable experiences that leverage off these assets.

The region has a strong tradition of sustainable tourism and eco-tourism visitor experiences. During the early 2000s, this was exemplified by the Greenbox eco-tourism development initiative in the northern part of the region. Many participating businesses still operate eco-tourism experiences. There is also a body of very established environmental initiatives that offer great visitor experiences. These include the Organic Centre, Irish Seed Savers and a range of bog and wetland experiences which serve to educate as well as provide experiences for visitors.

Other highlights since the inception of the brand include Waterways Ireland launch of the Shannon Tourism Masterplan, and the establishment of three cross-county commercially-focused tourism networks. The investment of €1m by Fáilte Ireland in 40 visitor attractions and activity providers throughout the Hidden Heartlands Website Improvement Programme saw a significant improvement in the digital presence of the region and the digital capability of the businesses involved.

Significant investment was also secured for a range of capital projects, including the renewal of the National Famine Museum at Strokestown Park House and the development of a new visitor experience at the Shannon Pot and the Cavan Burren. The development of water sports facility blocks in Leitrim, Tipperary and Clare was secured, while a Masterplan for Lough Key Forest Park was prepared.







## VALUE AND SHARE OF TOURISM IN 2019

**€307m**

VALUE OF TOURISM IN THE REGION

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**€178m**

REVENUE GENERATED BY OVERSEAS TOURISTS

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**€129M**

REVENUE GENERATED BY REPUBLIC OF IRELAND TOURISTS

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**7,000**

TOURISM JOBS SUPPORTED

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**4.1%**

SHARE OF TOTAL OVERSEAS TOURISTS TO IRELAND

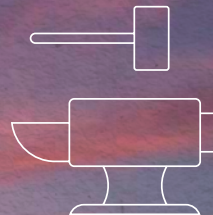
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**6.7%**

SHARE OF TOTAL DOMESTIC TRIPS IN IRELAND

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### 1.3. STRATEGIC CONTEXT

The *Ireland's Hidden Heartlands Regional Tourism Development Strategy 2023 – 2027* is guided by a number of important national policies and strategies, primarily the Government's Tourism Strategy *People, Place and Policy: Growing Tourism to 2025*, Fáilte Ireland's *Corporate Strategy 2021-2023* and the report of the Sustainable Tourism Working Group *Actions to Promote Sustainable Tourism Practices 2021-2023*.

The Strategy is also informed by planning policy, including the National Planning Framework, the Regional Spatial and Economic Strategies and lower tier plans. It is also anticipated that during the life of this strategy, forthcoming national policies and/or strategies, specifically those which reflect a need for responsiveness in light of evolving climate change legislation may inform and change aspects of the

Regional Tourism Development Strategy. These include: the development and publication of a new Government Tourism Policy which mainstreams sustainability and aligns with the 2021 Climate Action Plan, Tourism Ireland's forthcoming (2023) Corporate Strategy and Fáilte Ireland's own Corporate Strategy which expires at the end of 2023. The Ireland's Hidden Heartlands Regional Tourism Development Strategy will review and respond appropriately to these policies and strategies on an ongoing basis.

*Fáilte Ireland's Corporate Strategy* seeks to guide the industry back to recovery following the Covid-19 global pandemic. It sets out a course of action based on the following eight strategic pillars, from which this Regional Tourism Development Strategy takes its cue:

1.	To sustain tourism businesses in the short term so they can thrive over the long term.	Survive to Thrive.
2.	To support industry to attract and retain talent to support sustainable growth.	Supporting Tourism Careers.
3.	To achieve a sustained step change in Irish stay-cations.	Accelerate Domestic Tourism.
4.	To transform Ireland's outdoor tourism experience.	Opening the Outdoors.
5.	To transform Irish tourism's online presence and e-commerce capability.	Digital that Delivers.
6.	To enhance the destination experience and support the industry in building a pipeline of future international business.	Destination Development and Distribution.
7.	To reduce the carbon footprint of the tourism sector and make it much more sustainable.	Driving Climate Action.
8.	To ensure our delivery is best in class.	Delivering Excellence.

The strategy that follows for Ireland's Hidden Heartlands serves to deliver on each of the above eight strategic pillars.

## 1.4. REGIONAL RECOVERY AND GROWTH FORECAST

Forecasting is very difficult in the current economic environment, particularly in the midst of rapidly rising energy costs. While we have made the following recovery and growth forecast for Ireland's Hidden Heartlands using the best available data to hand, we will ensure we keep these predictions under periodic review and update them regularly.

Given the high level of domestic trips taken by the Irish population during the pandemic, which remained resilient when travel was once again permitted, the ambition is that the domestic market will be the bedrock for Ireland's Hidden Heartlands in the medium term. 2020 and 2021 saw the region introduced to many first-time domestic visitors. The opportunity now exists to convert these 'first-timers' into repeat visitors over time. While there is a risk that the domestic market may experience a dip in 2023 due to international travel re-opening and Irish people taking the opportunity to travel overseas, over the medium term we anticipate domestic trips will recover well.

Given Ireland's high reliance on overseas tourists for earning, real recovery to pre-pandemic levels will only be possible when international tourism returns. The overseas market is likely to recover more slowly as connectivity returns, 2022 levels of business are likely to be approximately 60% of 2019 nationally but this includes business carried over from 2020 and 2021, so recovery is likely to slow in 2023 and our best estimate is that demand will be back to 2019 levels by 2026. In the early days of international travel re-opening, overseas tourists are more likely to return to the traditional destinations in Ireland first, before exploring the lesser-known areas.

### OUR AMBITION

Our ambition for this strategy is to drive recovery and growth of the visitor economy in Ireland's Hidden Heartlands creating sustainable, high-quality jobs that will support and strengthen local communities while protecting our natural environment. This will be achieved by raising awareness and consideration of the region as a visitor destination and by increasing the average length of stay. In doing so, we will redefine tourism success based on our sustainability goals.

Considering the restrictions in place in Q1, 2022 has been a strong year across the region aided by pent-up demand and deferred bookings from the previous two years, 2023 and beyond are expected to be challenging yet more predictable in terms of booking patterns. Forecasting the rate and pace of recovery and growth is difficult but at a minimum we expect a return to 2019 levels of revenue by 2026, in inflation adjusted terms, with an ambition to exceed this.

We also expect an additional 5% supply side capacity (accommodation, visitor attractions, activity providers, etc.) to come on stream over the period of this strategy, which would be achieved through optimising existing assets (e.g. longer opening hours) as well as developing new stock.

### REGIONALITY

It is Fáilte Ireland's long-term objective to ensure a greater regional spread of the socio-economic benefits of tourism across the country. For the Hidden Heartlands, this means growing tourism revenue at a faster rate in areas that are less visited relative to the more popular destinations nationally over the period of this strategy while staying within existing infrastructural and environmental capacities. While the short-term focus is on recovery in all areas, as the recovery progresses, we will set more specific regional targets which will be considered at the mid-term review of this regional tourism strategy, informed by the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, Tourism Ireland's and Fáilte Ireland's new statements of strategy which are due to be delivered in 2023/24

### SEASONALITY

Over the medium to long term, we will look to step change the region's offering and positioning to ensure that it is an attractive year-round destination for sustainable tourism experiences for both domestic and international visitors.



## FUTURE TRENDS

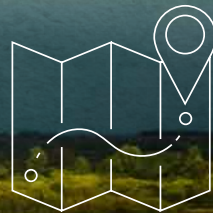
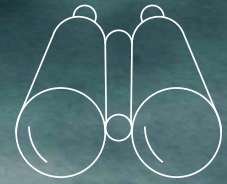
Recovery and growth will be delivered by ensuring the Ireland's Hidden Heartland's product and experience base is aligned with future tourism demand trends. Continuous monitoring of international tourism and destination trends, visitor sentiment and international consumer research will provide us with an additional

framework to influence future development activity. This will ensure our experiences are 'fit for purpose' and we will build on the emerging opportunities Ireland's Hidden Heartlands is well positioned to capitalise on. The illustration below highlights some of the future trends in tourism that we will be monitoring in the years ahead.



Source: Repucon Consulting.











A map of Ireland with 14 counties highlighted in olive green. The highlighted counties are Leitrim, Cavan, Roscommon, Longford, Westmeath, Galway, Offaly, Clare, Tipperary, Limerick, and Cork. Other counties shown in a lighter green are Mayo, Monaghan, Meath, Kildare, Laois, and Wicklow. The text '2. IRELAND'S HIDDEN HEARTLANDS – VISION FOR THE FUTURE' is overlaid on the map.

## 2. IRELAND'S HIDDEN HEARTLANDS – VISION FOR THE FUTURE

Galway

Offaly

Clare

Tipperary

Limerick

Cork

Leitrim

Cavan

Roscommon

Longford

Westmeath

Mayo

Monaghan

Meath

Kildare

Laois

Wicklow

## 2.1. OUR VISION FOR IRELAND'S HIDDEN HEARTLANDS

*IT'S 2032 AND IRELAND'S HIDDEN HEARTLANDS IS ONE OF EUROPE'S LEADING REGENERATIVE TOURISM DESTINATIONS (TOP 10 RANKING), A PLACE WHERE TOURISM WORKS TO CREATE FLOURISHING PLACES AND THRIVING COMMUNITIES. THE REGION HAS BECOME WELL KNOWN AS A SUSTAINABLE DESTINATION WHERE VISITORS CAN RECONNECT WITH NATURE WHILE TAKING TIME OUT TO RECONNECT WITH FAMILY AND FRIENDS.*

*WITH THE RIVER SHANNON AND THE BEARA BREIFNE WAY AT ITS HEART, AND A WELL-CONNECTED WEB OF GREENWAYS AND BLUEWAYS SPREAD THROUGHOUT THE REGION, THIS IS A PLACE WHERE NATURE IS THE BACKDROP TO A WIDE RANGE OF COMPELLING VISITOR EXPERIENCES, FROM OUTDOOR ACTIVITIES TO UNCOVERING INTRIGUING HERITAGE AND CULTURAL GEMS THAT CONTINUALLY SURPRISE AND EXCEED VISITORS' EXPECTATIONS.*

*ACTIVE FUN-FILLED DAYS ROLL INTO RELAXING, COSY EVENINGS IN HISTORIC HOTELS AND LAKESIDE LODGES. ITS CHARACTERISTIC TOWNS AND VILLAGES ARE VIBRANT AND BUSTLING WITH GREAT RESTAURANTS AND MUSICAL PUBS. THE REGION, WHICH IS HIGHLY VALUED FOR ITS SPECIAL ENVIRONMENTAL QUALITIES AND BIODIVERSITY AND ITS EASY ACCESS TO THE OUTDOORS, HAS ALSO EARNED A REPUTATION FOR ITS WELLNESS QUALITIES, WHERE THE VISITOR IS RE-ENERGISED BY NATURE.*

## 2.2. OUR STRATEGIC CHALLENGE

### IRELAND'S HIDDEN HEARTLANDS – STRATEGIC CHALLENGE STATEMENT

*OUR STRATEGIC CHALLENGE IS TO INCREASE DOMESTIC AND INTERNATIONAL AWARENESS AND CONSIDERATION OF IRELAND'S HIDDEN HEARTLANDS AS A DISTINCTIVE REGION AND TO SUPPORT THE INDUSTRY IN SUSTAINABLY LEVERAGING THE ABUNDANCE OF AVAILABLE NATURAL AND CULTURAL ASSETS TO DEVELOP THE COMPELLING VISITOR EXPERIENCES THAT MEET AND EXCEED VISITORS' EXPECTATIONS, RESULTING IN INCREASED VISITOR REVENUE AND LOCAL JOBS, WHILE PROTECTING THE UNIQUE ENVIRONMENT OF THE REGION.*



## 2.3. OUR STRATEGIC OBJECTIVES

1

### AWARENESS AND RECOGNITION

Raise awareness and recognition of the region and brand among domestic and international visitors and increase the duration of visitor stays, particularly within the domestic market.

2

### VISITOR EXPERIENCES

Enhance the range and quality of our visitor experiences to underpin the Hidden Heartlands brand proposition, leveraging the natural and cultural assets of the region in a sustainable way with a focus on ecotourism.

3

### ECONOMIC IMPACT

Grow the economic impact of tourism and create jobs in local tourism by supporting the tourism industry (private, public and community sectors) to develop its capacity and capability while reducing its carbon footprint.

4

### REGENERATIVE TOURISM

Establish the region as one of the leading regenerative tourism destinations in Europe in which tourism results in net positive outcomes for communities and nature.

5

### INDUSTRY AND STAKEHOLDER

Build a committed industry and stakeholder coalition to guide and co-ordinate the sustainable development of destinations across the region.

## 2.4. ACHIEVING OUR VISION FOR IRELAND'S HIDDEN HEARTLANDS

# 1.

### STRATEGIC OBJECTIVE:

RAISE AWARENESS AND RECOGNITION OF THE REGION AND BRAND AMONG DOMESTIC AND INTERNATIONAL VISITORS AND INCREASE THE DURATION OF VISITOR STAYS, PARTICULARLY WITHIN THE DOMESTIC MARKET.

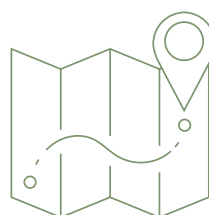
Increase the recognition levels among domestic and international visitors of the region and its signature experiences, and in particular, increase their consideration and intent to visit.

Build on the opportunity afforded by the strong domestic performance in 2020 and 2021 to establish the region's reputation for strong family-friendly and outdoor offerings.

Make it easier for the visitor to understand what the region has to offer and how it can be experienced through the provision of high quality visitor information.

While visiting friends and relatives is currently a strong overseas segment, establish a differentiated approach for this segment as opposed to holidaymakers, as well as developing differentiated approaches for domestic day trippers versus overnight stays.

Build on the success of the Website Improvement Programme through the Digital that Delivers Programme to establish an excellent digital presence for the region and its businesses.





# 2.

## STRATEGIC OBJECTIVE:

ENHANCE THE RANGE AND QUALITY OF OUR VISITOR EXPERIENCES TO UNDERPIN THE HIDDEN HEARTLANDS BRAND PROPOSITION, LEVERAGING THE NATURAL AND CULTURAL ASSETS OF THE REGION IN A SUSTAINABLE WAY WITH A FOCUS ON ECO-TOURISM.

Work with stakeholders to develop more distinctive and more rounded destinations that can act as strong attractors to the area and begin to disrupt traditional visitor flows around Ireland and drive more overnight stays in the region.

In association with a range of stakeholders and leveraging a range of funding sources, build out a network of Greenways, Blueways and walking & cycling trails, including the Beara Breifne Way.

Work with stakeholders to sustainably leverage the range of rich heritage and cultural assets that provide visitor experiences, while protecting their quality, character and distinctiveness.

Establish the Shannon as an iconic attractor for the region and raise the profile of many of the experiences associated with it, both on and off the water. In particular, increase consideration and intent for cruising on the Shannon as a highly desirable experience for visitors. Work with stakeholders to optimise the tourism potential of other key rivers and lakes in the region while protecting the ecological value of these environmental assets.

Work with Bord na Móna, the Local Authorities and local communities to optimize the tourism potential of the bogs, peatlands and wetlands, particularly around a Peatlands Trails Strategy, while ensuring that their ecological value is protected. Fáilte Ireland will also seek to support the rehabilitation of peatlands and enhance their ecological value as part of unlocking the potential of such sites, e.g. Knepp Castle Estate, East Sussex, England.

Establish a strong reputation for the region around ecotourism, the outdoor offering, getting active in nature and the opportunity to explore hidden cultural and heritage gems, by developing compelling visitor experiences around these propositions.

Help businesses and community enterprises to sustainably leverage our Greenways, Blueways and walking trails, etc. to create compelling and sustainable visitor experiences.

# 3.

## STRATEGIC OBJECTIVE:

GROW THE ECONOMIC IMPACT OF TOURISM AND CREATE JOBS IN LOCAL COMMUNITIES BY SUPPORTING THE TOURISM INDUSTRY (PRIVATE, PUBLIC AND COMMUNITY SECTORS) TO DEVELOP ITS CAPACITY AND CAPABILITY.

Provide appropriate supports and interventions to enable businesses to thrive post-Covid.

Facilitate the improvement of the digital and distribution capability of the industry.

Work with tourism providers in the region to deliver eco-tourism experiences.

Work with stakeholders in towns with strong accommodation bases to improve the value of the night-time visitor economy.

Devise and implement a Regenerative Tourism Scheme as part of the Just Transition Fund 2023-2026.

Support the community-based tourism enterprise sector, particularly in the areas of commerciality, governance and succession planning, to improve their sustainability.

Use the central location of the region in Ireland and the ease of access into it to grow the opportunities for business tourism.



# 4.

## STRATEGIC OBJECTIVE:

ESTABLISH THE REGION AS ONE OF THE LEADING REGENERATIVE TOURISM DESTINATIONS IN EUROPE IN WHICH TOURISM RESULTS IN NET POSITIVE OUTCOMES FOR BOTH COMMUNITIES AND NATURE.

Regenerative tourism is a model of tourism that should leave a place better than it was before. It goes beyond ‘doing no damage’ and seeks to deliver net positive benefits for communities, nature and the visitor.

Benchmark the region and its destinations in terms of their sustainability performance.

Work with the industry in the region to reduce its carbon footprint by 2030 in line with government targets.

Identify those businesses that are providing a truly sustainable visitor offering, particularly in the areas of regenerative, sustainable and eco-tourism, and provide them with additional marketing and sales opportunities, while working with others to improve their sustainability ratings.

Involve local communities in decisions about tourism that affect their areas and address any concerns that they have about tourism.

Ensure that tourism plays an active part in the Just Transition programme, providing sustainable jobs in tourism for local communities.

Support the uptake of sustainability measurement and certification programmes at both enterprise and destination levels.

# 5.

## STRATEGIC OBJECTIVE:

BUILD A COMMITTED INDUSTRY AND STAKEHOLDER COALITION TO GUIDE SUSTAINABLE DESTINATION DEVELOPMENT ACROSS THE REGION.

Prepare and implement Destination and Experience Development Plans (DEDPs), relative to the maturity stage of each destination, and to which all stakeholders are aligned.

Put in place effective partnership and governance models to support a collaborative ways of working among all the stakeholders in the region and at destination level.

Build strong and effective industry networks and clusters to facilitate collaboration, cross-promotion and cross-selling.

In light of the forthcoming Leader Programme (2023 – 2027), establish an aligned approach with the Leader Companies in the region on rural tourism development.





A map of Ireland with 14 counties highlighted in olive green. The highlighted counties are Leitrim, Cavan, Roscommon, Longford, Westmeath, Galway, Offaly, Clare, Tipperary, Limerick, and Cork. Other counties shown in a lighter green are Mayo, Monaghan, Meath, Kildare, Laois, and Wicklow. The text '3. IRELAND'S HIDDEN HEARTLANDS – STRATEGIC FRAMEWORK' is overlaid on the map in white and yellow.

### 3. IRELAND'S HIDDEN HEARTLANDS – STRATEGIC FRAMEWORK

Galway

Offaly

Clare

Tipperary

Limerick

Cork

Leitrim

Cavan

Roscommon

Longford

Westmeath

Mayo

Monaghan

Meath

Kildare

Laois

Wicklow

### 3.1. STRATEGIC FRAMEWORK 2023 – 2027

The strategic framework has been developed to achieve the vision for Ireland's Hidden Heartlands while overcoming the strategic challenges we face in the coming years. It begins by outlining our approach to achieving greater levels of sustainability in tourism (**Sustainability Strategy**). It establishes who we are targeting and how we will target them (**Visitor and Brand Strategy**). It identifies the requirement to match the delivery of experiences with what the visitor is looking for and how we will provide them (**Destination Development Strategy & Product Development Strategy**). It outlines how we will enable and assist the industry to grow its capacity and capability and deliver on this strategy (**Industry Development Strategy**), the manner in which we will improve the distribution pipeline for the industry's saleable experiences (**Distribution and Business Development Strategy**) and what will be done to effectively market the region (**Marketing Strategy**). It sets out what we will do to ensure tourism works to benefit local communities directly and to build capacity within them to create and sustain successful tourism enterprises (**Community Strategy**). It will ensure tourism not only protects but works to regenerate the local environment and heritage (**Environmental Strategy**).

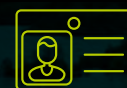
The strategic initiatives are outlined over the five-year time-frame of the plan. They provide the basis for a collective approach to deliver the strategy a number of stakeholders will work together on and ensure we deliver on the target objectives defined in section 2.3.

*TO ENSURE THE STRATEGY REFLECTS OUR SUSTAINABLE TOURISM GOALS, THE PLAN DELIVERY FRAMEWORK ADOPTS THE VICE MODEL TO GUIDE THE PLAN IMPLEMENTATION.*

## SUSTAINABLE TOURISM MODE



SUSTAINABILITY

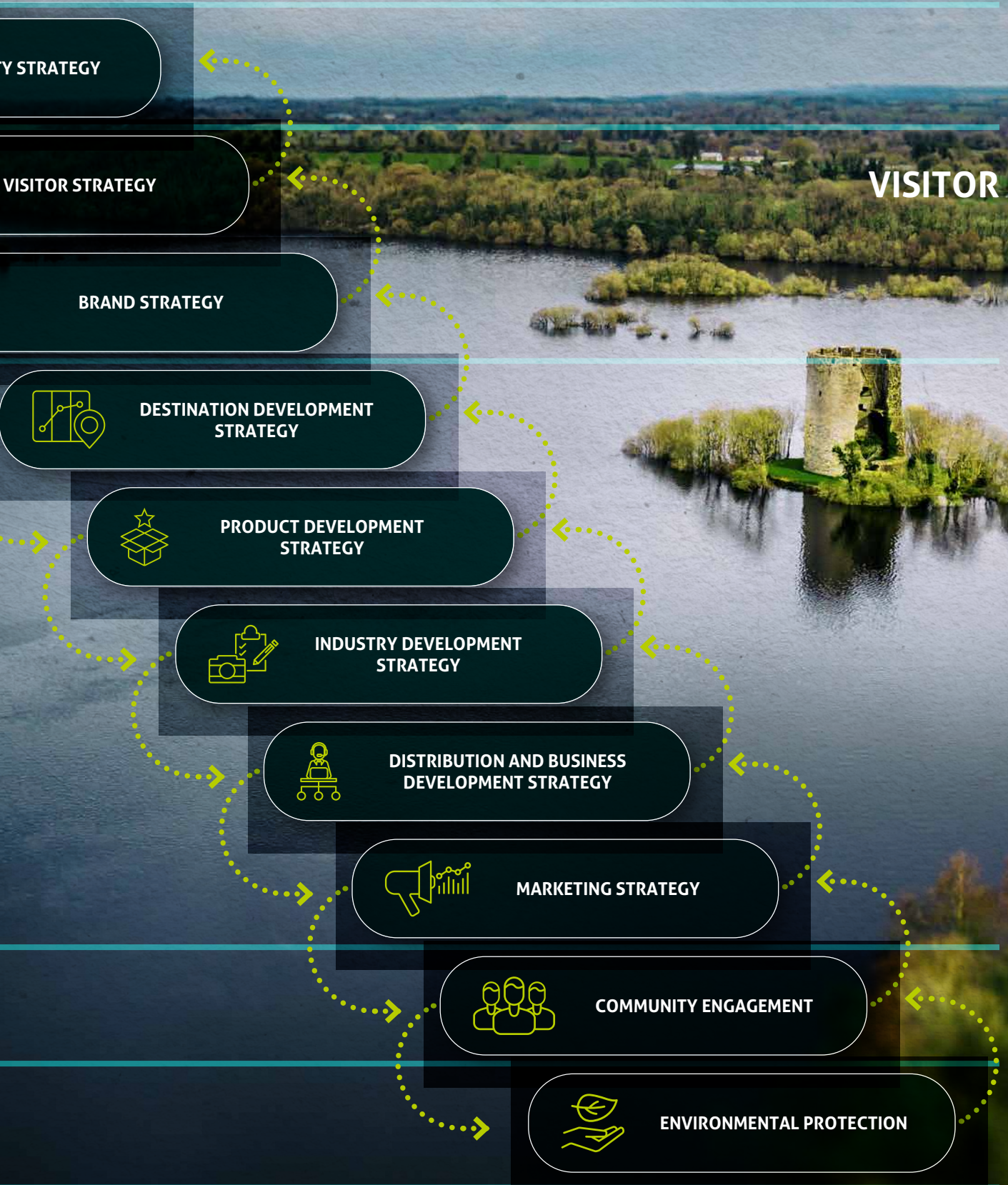


## INDUSTRY

## COMMUNITY

## ENVIRONMENT







## 3.2. SUSTAINABILITY AND CLIMATE ACTION STRATEGY



Against the backdrop of the **UN Sustainable Development Goals**, Government's commitments under the **Paris Agreement**, and the national **Climate Action Plan 2021**, which includes actions that are relevant to Fáilte Ireland as a Key Stakeholder, Fáilte

Ireland's approach to tourism development is to ensure that it becomes increasingly sustainable ensuring it can continue to generate incremental revenue to sustain and increase levels of employment in local communities while identifying goals and measuring progress towards meeting of national and sectoral commitments relating to emission targets.

For over ten years, Fáilte Ireland has employed the internationally recognised sustainable tourism model VICE. It focuses on the interaction between Visitors (V), the Industry (I) that serves them, the Community (C) and culture that hosts them and their collective impact on and response to the Environment (E) to guide the future sustainable development of tourism.

Our approach aligns with UNWTO definition of sustainable tourism as "Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities". It reflects the organic relationship Fáilte Ireland envisages between our tourism industry partners, the communities where we work and the natural and built environment which makes the Irish tourism product so unique.

Since 2021, Fáilte Ireland's approach has also incorporated a specific suite of actions across all its work based on the recommendations of the Sustainable Tourism Working Group (STWG). The recommendations ([www.gov.ie/en/publication/c0cd3-sustainable-tourism-working-group-report](http://www.gov.ie/en/publication/c0cd3-sustainable-tourism-working-group-report)) in the 2021 report are intended to promote sustainable tourism practices prior to the development of a new national tourism policy,

which mainstreams sustainability. The report stresses the interrelated nature of environmental, social and economic aspects of sustainable tourism development. It identifies the key role of the tourism sector in helping to deliver Ireland's commitments under the **Paris Agreement** on Climate Change, featured in Ireland's 2021 **Climate Action Plan**.

The actions contained in the Sustainable Tourism Working Group report directly influences all workflows across the organisation. They are captured under each of the strategic pillars of Fáilte Ireland's **Corporate Strategy 2021 - 2023**, in particular under the Driving Climate Action pillar. It includes the following key activities:

- **Driving Change through Knowledge and Metrics** where Fáilte Ireland's Research team is working to establish a benchmarkable CO<sup>2</sup> value for Irish tourism and a carbon calculator for tourism businesses;
- **Driving Change at the Level of the Business** where Fáilte Ireland's Enterprise Development team is working to develop an industry focused toolkit based on best practices to support businesses to understand and embed carbon reduction activities;
- **Driving Change at the Level of the Destination** where the Regional Development team, in conjunction with Local Authorities and other partners, will work with destinations in their region to benchmark their sustainability performance. They will take steps to progress them on their sustainability journey over the course of each DEDP, including improved access to public transport options. Our Commercial Development team will work with each regional convention bureau to improve their Global Destination Sustainability index scores, year on year;



- **Promoting Change through our visitors** where our Marketing and Commercial Development teams will create new sales and marketing opportunities for sustainable tourism businesses that are providing more sustainable options for our visitors;

Ireland has ratified the United Nations (UN) Convention on Biological Diversity, and all subsequent protocols and is fully committed to halting the loss of biodiversity and the degradation of ecosystem services as set out in the EU Biodiversity Strategy for 2030.

Government policy on nature conservation is outlined in the National Biodiversity Action Plan 2017-2021 (NBAP) which includes Ireland's vision for biodiversity 'That biodiversity and ecosystems in Ireland are conserved and restored, delivering benefits essential for all sectors of society and that Ireland contributes to efforts to halt the loss of biodiversity and the degradation of ecosystems in the EU and globally.

Fáilte Ireland, in implementing this strategy, will aim to comply fully with the objectives of the NBAP. Ireland has ratified the United Nations (UN) Convention on Biological Diversity, and all subsequent protocols and is fully committed to halting the loss of biodiversity and the degradation of ecosystem services as set out in the EU Biodiversity Strategy for 2030.

In accordance with Objective 1 of the NBAP to 'Mainstream biodiversity into decision-making across all sectors', Fáilte Ireland, in implementing this strategy, will aim to comply fully with the NBAP with regard to the protection, restoration and enhancement of biodiversity.

Together with the VICE approach to development at the regional level, these actions reflect how Fáilte Ireland will embrace an integrated and collaborative effort across the tourism sector to drive the broad ambition stated in the STWG report, where Ireland will seek to be among the world-leaders in sustainable tourism practice.

Our ambition and practical support to improve the sustainability of tourism will be evident at the regional and destination levels. It will include the integration of sustainability goals into Destination and Experience Development Plans (DEDPs) in

collaboration with local stakeholders, to providing practical tools for the hospitality sector to measure and reduce its carbon footprint. It will seek to support recruitment and the retention of jobs in the tourism sector. It represents a holistic and practical approach to sustaining and growing tourism's contribution to the economy, local communities and the environment underpins our efforts in this Regional Tourism Development Strategy.

This approach also seeks to go one step further by engaging the visitor fully in the life of the communities, environment and heritage as the core of Ireland's tourism offering, Fáilte Ireland aims to work with our partners to sustain the tourism sector and support a regenerative approach to tourism development. The COVID19 global pandemic has accelerated the level of visitor consciousness of their role in sustainability and responsible tourism. Sustainable destination development, especially in rural areas, must align with shifts in visitor expectations in re-defining the value of an experience with new levels of environmental awareness. Accordingly, our approach to sustainable tourism development across the regional brands will become part of the story we tell and determine how our brand and its associated stories resonate with domestic and international visitors.

For Ireland's Hidden Heartlands, the most important sustainability challenge will be to make decisions around tourism that benefit our communities, protect our natural and historic environment and reduce the carbon footprint of the industry. Tourism must work to create flourishing places and thriving communities. In growing tourism revenue, we must ensure that we protect the quality, character, distinctiveness and integrity of environmental and heritage assets and guarantee no negative impacts on local communities. Local communities must be at the centre of any decision-making around tourism affecting the place where they live.

### 3.3. VISITOR STRATEGY

#### RATIONALE

Our visitor strategy will be guided by a new Domestic Motivations Framework and a clear understanding of consumer motivations for travel through continuous visitor research. Similarly, we will be guided by the existing global segmentation model and any further iterations of it over the coming years. This will provide new opportunities for differentiated approaches in the marketing and promotion of Ireland's Hidden Heartlands.

The overall objective of the visitor strategy is to grow penetration in the domestic and overseas markets by focusing on raising awareness and driving consideration and intent across all segments. In particular, we will raise awareness of what there is to see and do in the region and drive consideration of Ireland's Hidden Heartlands as a destination of choice for visitors looking for outdoor activities and engagement with local culture and heritage.

#### UNDERSTANDING OUR VISITORS

##### Understanding our International visitors

In general, relaxation, variety of attractions and things to do, quality time with loved ones and value for money were influential when choosing where to go on a short break or holiday.

**British** - Due to proximity, British holidaymakers may feel like they know what Ireland has to offer and that it might be similar to what is available closer to home.

**Germany** - Germans are more likely to consume the landscape in an active way while soaking up the atmosphere of the authentic local culture is also important.

**France** - French holidaymakers enjoy getting off the beaten track, away from perceived tourist hotspots as a means to explore unspoilt landscapes. French visitors are attracted to authenticity and local experiences, and water-based experiences are very appealing to this market.

**US** - the link that many US citizens have to Ireland through the Diaspora remains a strong motivating factor in choosing Ireland as a holiday destination. This market very often stays for longer periods and are high spenders.





## INTERNATIONAL VISITORS – SUMMARY PROFILE (2019)

**449,000**

NUMBER OF  
OVERSEAS VISITORS

**40%**

PERCENTAGE OF VISITORS TO IHH  
VISITING FRIENDS OR FAMILY (VFR)

**€178m**

VALUE GENERATED  
BY OVERSEAS VISITORS

**57%**

PERCENTAGE OF NIGHTS SPENT BY VISITORS  
IN PAID SERVICES ACCOMMODATION

**€397**

AVERAGE SPEND  
PER VISITOR TO IHH

**67%**

PERCENTAGE OF VISITORS TO IHH VISITING  
BETWEEN JUNE AND SEPTEMBER

**6.1**

AVERAGE NUMBER  
OF NIGHTS SPENT IN IHH

**65%**

PERCENTAGE OF IHH VISITORS WHO SPENT  
AT LEAST ONE NIGHT ON WAW

**33%**

OVERSEAS VISITORS AS A PERCENTAGE  
OF TOTAL VISITORS TO IHH

**61%**

PERCENTAGE OF IHH VISITORS WHO SPENT  
AT LEAST ONE NIGHT IN DUBLIN

**50%**

PERCENTAGE OF VISITORS WHOSE MAIN  
PURPOSE FOR VISIT WAS A HOLIDAY

**42%**

PERCENTAGE OF IHH VISITORS WHO  
SPENT AT LEAST ONE NIGHT IN IAE



## Understanding our Domestic Visitors

While the pandemic has negatively impacted on domestic travel, the relativities of profile and behaviour from 2019 and the last two years remain the same. The region has a penetration of just 5.5% (percentage of most recent trip). With a high intent of 33% (intend to travel to IHH) there is a strong opportunity to focus on driving more visitors to the region through building consideration and intent. The region has 35% awareness but only 16% consideration. 22% of first time visitors had never been to the Hidden Heartlands which speaks further to the penetration strategy.

Fáilte Ireland's new Motivations Segmentation for the domestic market has unlocked insights that have allowed the region to identify priority segments for targeting and development. Research has shown that, of the drivers for taking a trip, motivation is the most important reason (significantly so, at more than double the next driver) for trip behaviour. After motivation, in rank order, what visitors wanted to do, when they want to take a trip, and lastly, who with (and other demographics), including travel party, are the balance of the drivers of taking a trip.

## The definitions of each of the motivations are as follows:

- **Social Energy:** to enjoy the atmosphere, vibrancy and energy of a place.
- **Adventure:** to push myself and do things out of my comfort zone, mainly in the outdoors.
- **Exploration:** to explore the new and unfamiliar in an area, including culture.
- **Time Out:** to escape my everyday life and de-stress.
- **Reconnection:** to relax and do very little, mainly with person or friends closest to me.
- **Bonding:** to nurture the relationships with my family and those closest to me.
- **Celebration:** to celebrate a special occasion.



Source: Fáilte Ireland.



Ireland's Hidden Heartlands over indexes (in comparison with travel in general) for families with young children and for couples younger than 45. As a result **Bonding** is the primary travel motivation, followed by Social Energy, and then Adventure. Interestingly, Ireland's Hidden Heartlands' under indexes on exploration, which is an opportunity to create awareness of the things to do in the region. Visitors over index on engaging in multiple outdoor activities, which is linked to the Adventure motivation, with further opportunity for development in this arena.

When children are the dominant travel party, as in the IHH, their needs will always dominate the choice of location. With Bonding being the primary

motivation for taking a trip, convenience, ease of access to the location, safety and accessible facilities are important when deciding on where to travel. The least important reasons for choosing a location are local culture, local night-life and local food and drink.

When it comes to accommodation, Ireland's Hidden Heartlands over indexes on self-catering, while hotels remain the largest accommodation type where visitors will stay. Ireland's Hidden Heartlands is ideally placed to include a focus on the shoulder season – with intent for these months standing out from the other regions (in particular, September). Given its location, it is ideally placed to encourage visitors to spend time in the region beyond the summer.

## DOMESTIC VISITORS – SUMMARY PROFILE (2019)





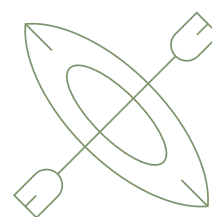
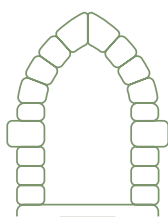
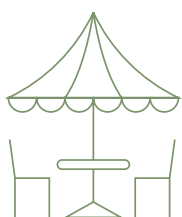
## STRATEGIC FOCUS FOR OUR VISITOR STRATEGY – ADDRESSING OUR STRATEGIC OBJECTIVES

**STRATEGIC OBJECTIVE 1:** RAISE AWARENESS AND RECOGNITION OF THE REGION AMONG DOMESTIC AND INTERNATIONAL VISITORS AND INCREASE THE DURATION OF VISITOR STAYS, PARTICULARLY DOMESTIC.

**STRATEGIC OBJECTIVE 2:** BUILD OUT THE RANGE AND AVAILABILITY OF COMPELLING VISITOR EXPERIENCES TO UNDERPIN THE HIDDEN HEARTLANDS BRAND PROPOSITION.

### STRATEGIC INITIATIVES.

1. Clearly identify the domestic and overseas target market segments for Ireland's Hidden Heartlands and continually refine who they are and what their needs are. Support the industry in identifying further opportunities (marketing and product development, etc.) through the delivery of workshops on the domestic market motivations and segmentation framework.
2. Ensure that messaging of domestic and international target market segments is aligned to their core motivations.
3. Attract more luxury visitors to Ireland's Hidden Heartlands from core markets with the aim of attracting higher spending and longer staying visitors to the region.
4. Provide relevant and timely local information to visitors in-destination through multiple channels, including DiscoverIreland.ie, Tourist Information Centres, Tourism Information Kiosks, a portfolio of multi-lingual map guides and a contact centre concierge service.
5. Create and train networks of Local Experts (tourism's frontline teams) on all there is to do and see locally and how best to share this information with visitors.
6. Review the availability and quality of and duration of season for visitor experiences in the region to ensure that they can meet and exceed the expectations of the target market segments.
7. Develop industry supports to optimise business mix, focusing on revenue generation and core high yield markets.





### 3.4. BRAND STRATEGY

The brand for Ireland's Hidden Heartlands is more than just a logo or a statement – it is the promise we make to our visitors about the type of experience they will have when they visit the region. For Ireland's Hidden Heartlands, the brand resonates strongly with the visitor's motivations of exploration, bonding with family and friends and time out.

Over the course of this Regional Tourism Development Strategy, Fáilte Ireland will work with its partners and a wide range of tourism businesses to encourage a high level of brand adoption and build a shared development agenda to ensure that the brand promise is delivered to a high standard across all touchpoints of the visitor experience.

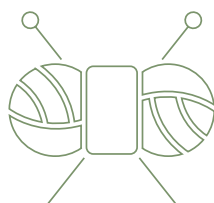
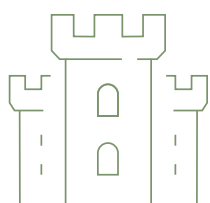
#### STRATEGIC FOCUS FOR OUR BRAND STRATEGY – ADDRESSING OUR STRATEGIC OBJECTIVES

**STRATEGIC OBJECTIVE 1:** RAISE AWARENESS AND RECOGNITION OF THE REGION AMONG DOMESTIC AND INTERNATIONAL VISITORS.

**STRATEGIC OBJECTIVE 5:** BUILD COMMITTED INDUSTRY AND STAKEHOLDER PARTNERSHIPS TO GUIDE SUSTAINABLE DESTINATION DEVELOPMENT ACROSS THE REGION.

#### STRATEGIC INITIATIVES.

1. Prepare a brand toolkit for Ireland's Hidden Heartlands.
2. Increase brand adoption by tourism business throughout the region.
3. Ensure brand alignment between all stakeholders and industry to ensure that messaging around the brand is consistent and in accordance with the brand toolkit. This will be particularly important in 2022 for businesses in the new geographies that have been incorporated into the Hidden Heartlands area.
4. Deliver a series of brand adoption workshops as part of an ongoing network development programme in each of the destinations.
5. Ensure that the brand proposition informs further tourism experience development in the region.
6. Continue to improve brand awareness by improving the digital shop window of the region through the Digital That Delivers initiative and building on the 2020 Website Improvement Programme.





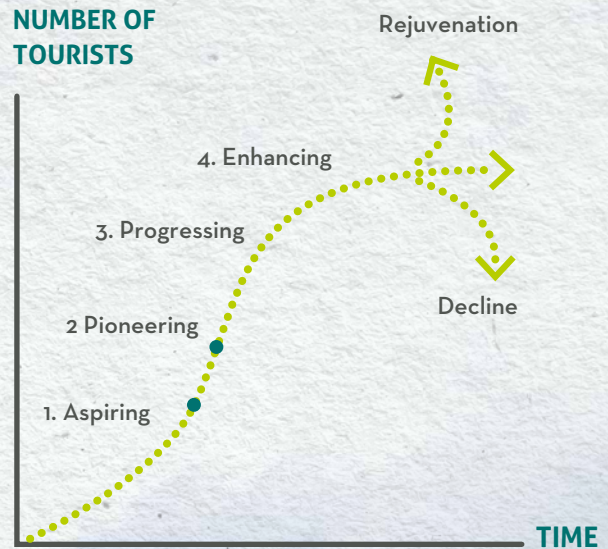
### 3.5. DESTINATION DEVELOPMENT STRATEGY

#### DESTINATION DEVELOPMENT FRAMEWORK

Distinctive destinations are the heartbeat of tourism. A visitor attraction might be why someone travels to an area, but a great destination is why they will stay. All destinations are different from one another and are at different levels of destination maturity. In Fáilte Ireland, we have identified four levels of destination maturity. Starting with **Aspiring** destinations, which represent areas with low levels of tourism activity, the stages of destination maturity grow to **Pioneering** before developing into more mature tourism destinations defined as **Progressing** and **Enhancing**.

Each maturity level is defined through a set of assessment criteria focused on creating distinctive destinations. These include factors such as current levels of recognition within the overseas and domestic markets and the density and quality of tourism products and accommodation. Additional considerations include the depth of services (day and evening time) available for visitors in the destinations primary and secondary hubs and the strength of local tourism industry networks.

#### Destination Maturity Model



Adapted from Butler, (1980), Tourism Area Life Cycle.



The four destination maturity categories each establish a number of key objectives to be achieved. In very mature destinations (i.e. Enhancing), the core objectives will include visitor experience innovation and visitor dispersal. Destinations categorised as Aspiring or Pioneering might focus on development activity such as product development, improving visitor infrastructure and building effective local tourism networks.

Developing destinations successfully requires a wide range of stakeholders to work together towards a shared vision. The most successful destinations will all have strong partnerships and networks in place between the various stakeholders, businesses and communities.



Source: Fáilte Ireland & Repucon Consulting.

## DESTINATION AND EXPERIENCE DEVELOPMENT PLANS (DEDPS)

This Regional Tourism Development Strategy, together with the Shannon Tourism Masterplan, provides a strategic framework for the sustainable development of the destinations in Ireland's Hidden Heartlands. Making them great places to visit requires a multi-layered, multi-stakeholder approach reflecting the range of factors that influence the visitor experience.

In order to co-ordinate this approach, we will prepare and implement a Destination and

Experience Development Plan (DEDP) for each destination. A DEDP sets out the challenges and opportunities for tourism in a destination and presents an action plan for the sustainable development of tourism over 3-5 years. All DEDPs are organised around the VICE model and will be subject to environmental assessment as relevant.

In addition to the existing DEDP for Lough Derg, we will prepare a further four DEDPs over the period of this strategy in association with the relevant stakeholders and industry, and commensurate to the needs of the destination in accordance with the Destination Development

Framework. This will ensure that every part of the region has an appropriate development plan in place within the lifetime of this strategy.

The timings for the preparation of these DEDPs, together with their destination maturity rating, is as follows:

DESTINATION	MATURITY	TIMING OF DEDP
LOUGH DERG (TIPPERARY, CLARE & GALWAY)	Pioneering, with areas that are Aspiring	Launched in April 2021
MID SHANNON & MIDLANDS (WESTMEATH, SOUTH ROSCOMMON, LONGFORD & OFFALY), INCLUDING THE ROYAL AND GRAND CANALS	Pioneering, with areas that are Aspiring	Commence in 2023
UPPER SHANNON, SHANNON ERNE & BORDER (NORTH ROSCOMMON, LEITRIM, CAVAN)	Pioneering, with areas that are Aspiring	Commence in 2022
EAST GALWAY	Aspiring	Commence in 2023
BALLYHOURA	Aspiring	Commence in 2023

Note: The existing tourism development plan for the Slieve Blooms will continue to be led by the Ireland’s Ancient East team and will be jointly implemented by the Ireland’s Hidden Heartlands and the Ireland’s Ancient East teams.

## COLLABORATION

The key to the success of this strategy will be the strength of collaboration between all partners that includes the tourism industry, Local Authorities, state agencies, enterprise and community groups. The strategy will require close collaboration with the Wild Atlantic Way and Ireland’s Ancient East regional teams, particularly in the preparation of DEDPs. This will result in the development and promotion of touring routes and itineraries to encourage new visitor flows and open up opportunities for less-visited destinations.

Cross-border collaboration is also a key feature of this collective approach, particularly the development and promotion of the UNESCO Cuilcagh Lakelands Geopark, Ireland’s only cross-border Geopark and in the development and promotion of the Shannon-erne Waterway.

There is a particular opportunity in the region to ensure that tourism contributes positively to the objectives of the **Just Transition** programme by creating much needed sustainable enterprises and jobs. A number of tourism related projects have already been funded by Just Transition.

A tourism development plan has recently been prepared for the Slieve Blooms which will be delivered in association with the Ireland’s Ancient East team.

### Strategic Focus for Destination Development – Addressing our Strategic Objectives

The following sections highlight how the sustainable development of a number of key components of our destinations will be approached, including influencing visitor flow across the region, growing the range and quality of our accommodation stock and improving accessibility. They also address initiatives to improve access and grow sustainable transport options while working closely with local stakeholders to develop our towns and villages into vibrant visitor hubs.



### 3.5.1. DEVELOPING VIBRANT TOWNS & VILLAGES

A tourism destination town is a town in which a visitor can spend an overnight and in which a cluster of products, services, activities and experiences are offered. It incorporates various stakeholders and intangible elements, such as its character, image and identity and can function as a touring base for visitors.

Those towns that provide a wide variety of products, services and experiences have the opportunity to increase visitor dwell time and expenditure in local businesses and communities. A town that hopes to attract staying visitors has to be able to successfully deliver both a daytime and night-time economy offering. Ideally, visitors will leave the town feeling there was more they could have done or seen, and that they had not exhausted the opportunities and are therefore eager to return for more.

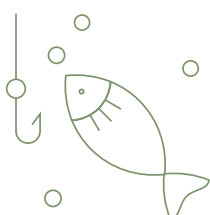
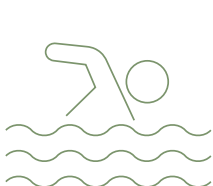
## STRATEGIC FOCUS FOR DEVELOPING VIBRANT TOWNS & VILLAGES – ADDRESSING OUR STRATEGIC OBJECTIVES

**STRATEGIC OBJECTIVE 2:** BUILD ON THE RANGE AND AVAILABILITY OF COMPELLING VISITOR EXPERIENCES TO UNDERPIN THE HIDDEN HEARTLANDS BRAND PROPOSITION.

**STRATEGIC OBJECTIVE 5:** BUILD COMMITTED INDUSTRY AND STAKEHOLDER PARTNERSHIPS TO GUIDE SUSTAINABLE DESTINATION DEVELOPMENT ACROSS THE REGION.

### STRATEGIC INITIATIVES.

1. In association with Local Authorities and the industry, ensure key towns and villages, with the potential to act as stronger overnight attractors for visitors, have a rounded day and night-time offering, by creating a range of new and enhanced saleable visitor experiences ready for market.
2. In partnership with Local Authorities, leverage available funding to deliver the optimum tourism outcomes for key towns with a strong accommodation base in the Hidden Heartlands.
3. Create a strong evening economy and an attractive public realm, which will retain the visitor longer and maintain competitiveness (URDF/RRDF, Town and Village Renewal, Destination Town funding, Fáilte Ireland Outdoor Animation and Outdoor Dining Funding).

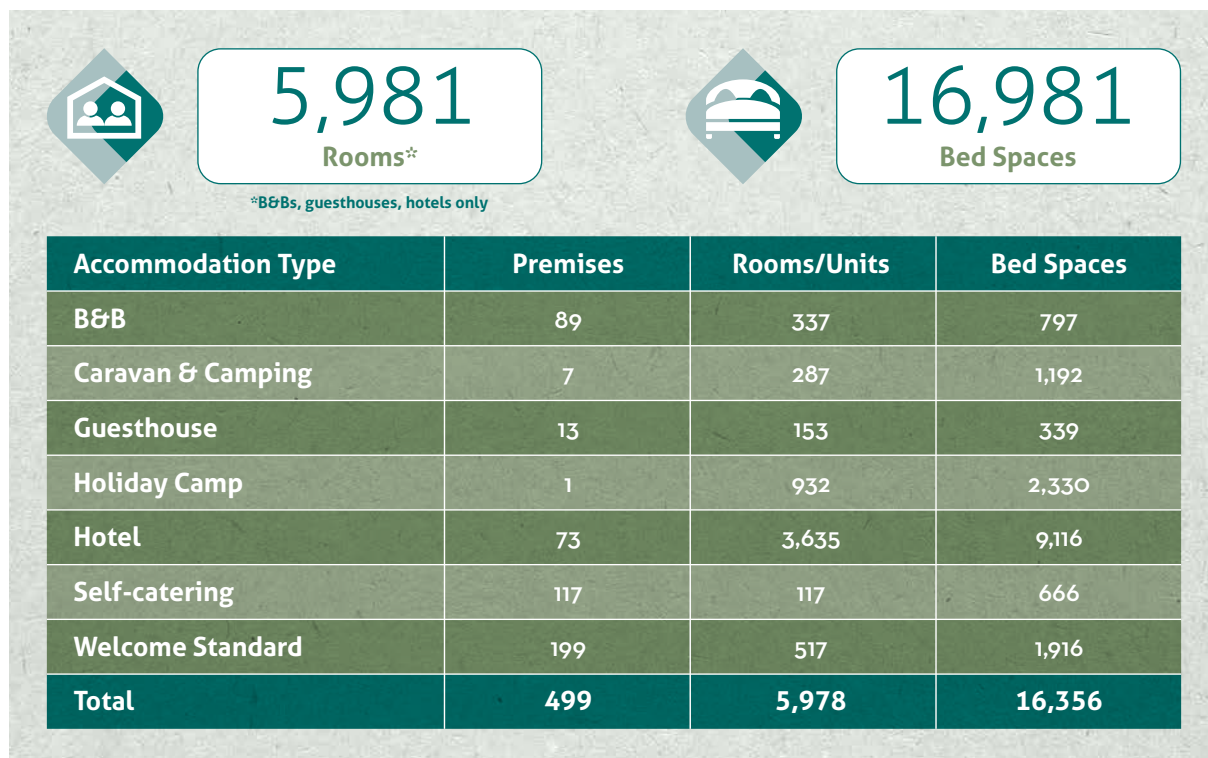


### 3.5.2. ACCOMMODATION STRATEGY

#### RATIONALE

Ireland’s Hidden Heartlands accounts for 499 registered accommodation properties (10% of national), 5,978 rooms/units (7% of national) and 16,356 bedspaces (7% of national). This

includes Center Parcs which is the single biggest accommodation provider in the region and an ‘iconic’ visitor attractor, with the ability in its own right to attract visitors into the region.



Pre-pandemic and during the recovery period, the region saw relatively strong levels of investment in accommodation. Most notably Center Parcs, and developments such as CABU, Glasson Lakehouse and Drunhierny Woodland Hideaway. It is expected that opportunities for small developments of alternative accommodation, such as lakeside lodges and woodland cabins, will continue to be taken by developers over the next five years. As anticipated, the focus for the next five years will be on survival and recovery, construction of new hotels will be slower than pre pandemic needs analysis suggested, with many hoteliers focused on improving the quality of the accommodation offering.

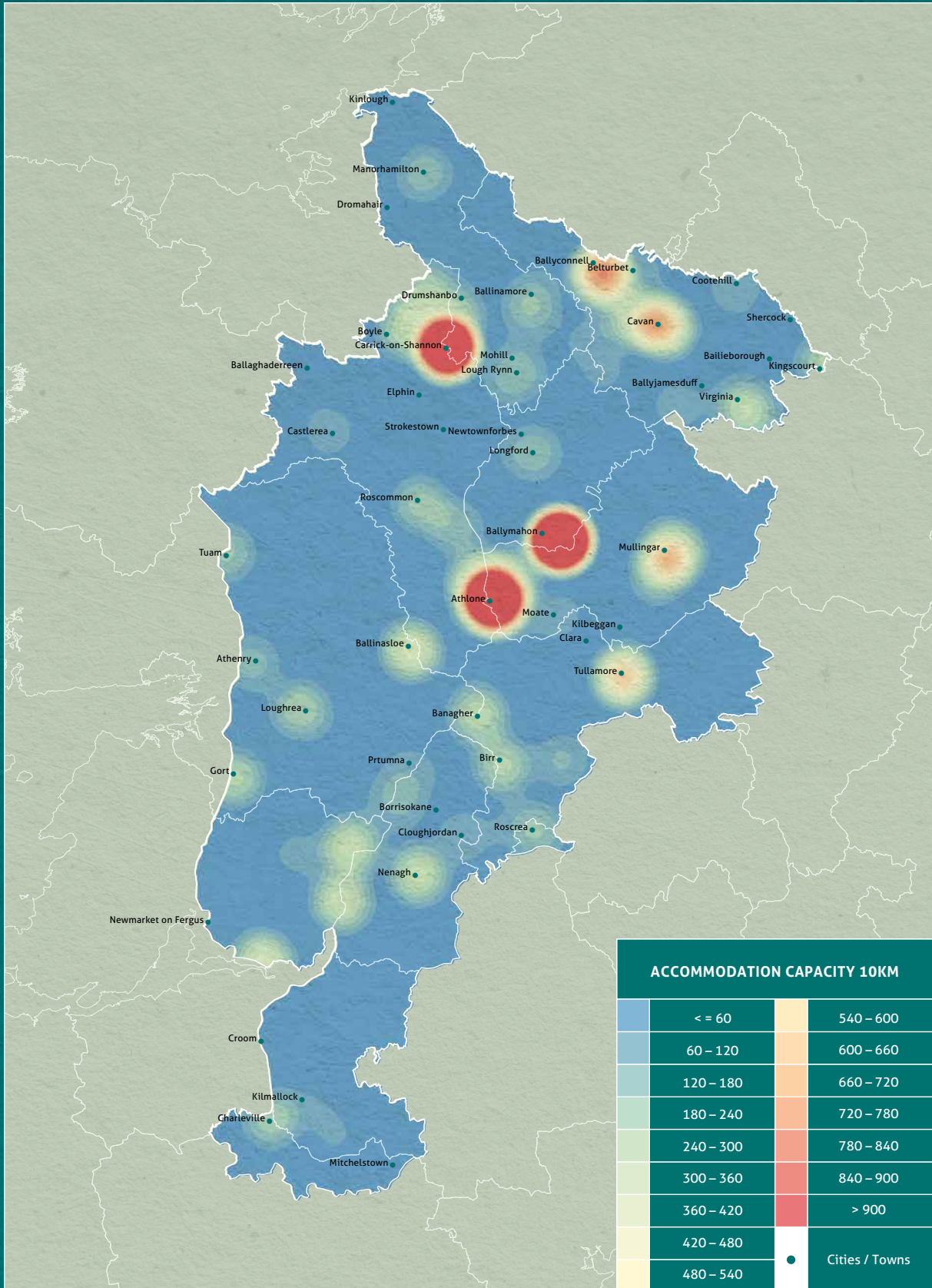
‘Housing for All’ is the government’s housing plan for Ireland to 2030 [www.gov.ie/housingforall](http://www.gov.ie/housingforall)

The new housing plan includes a provision for legislation on the revised regulatory controls requiring the registration of all tourist short-term and holiday lets accommodation with Fáilte Ireland under a ‘STTL’ Short Term Tourist Letting register from 2023.

At present Fáilte Ireland’s statutory functions relate to the regulation of those types of tourist accommodation that are prescribed terms under the TTAs (Tourist Traffic Acts) such as “hotel” and “guesthouse”.



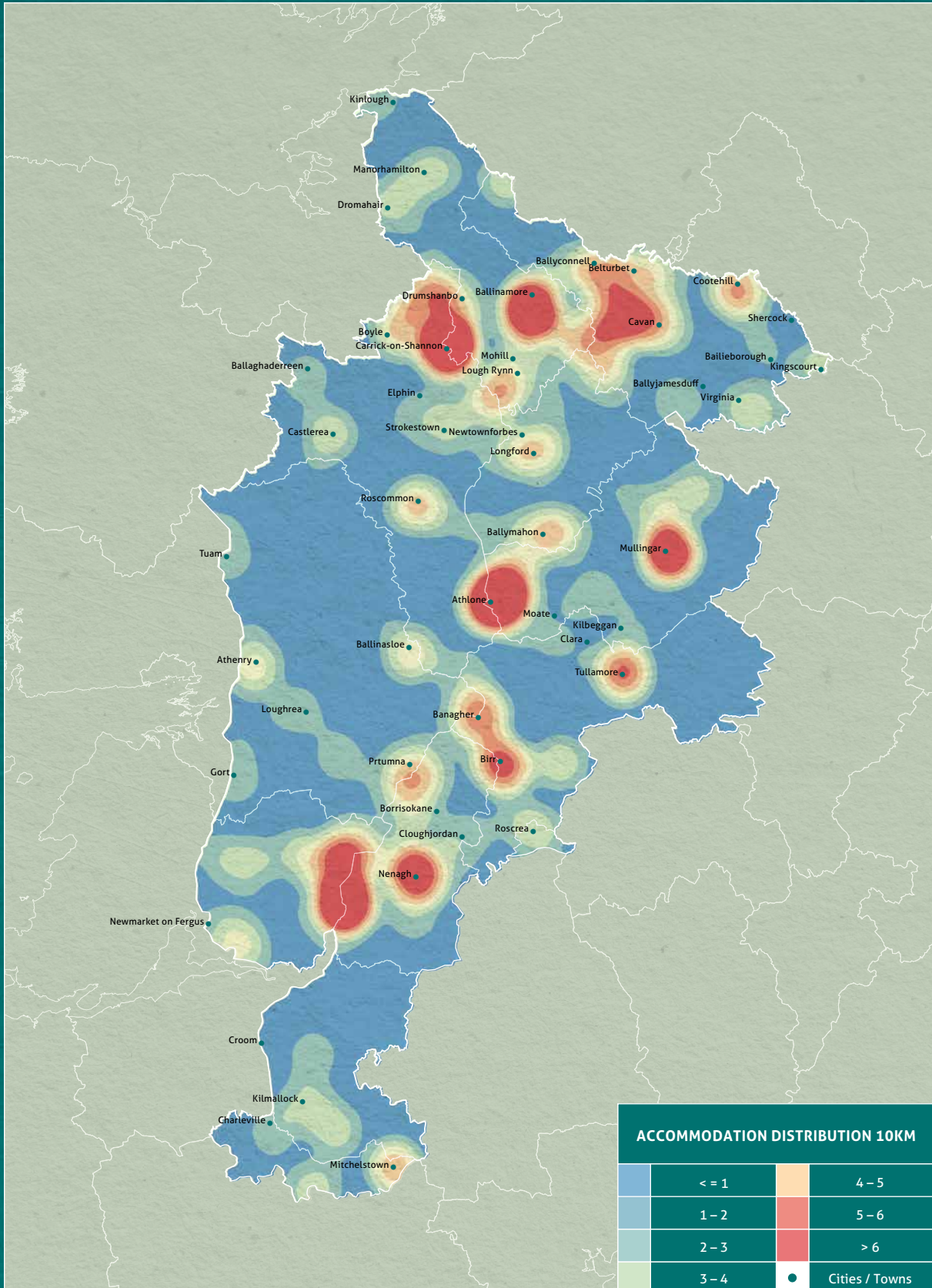
## ACCOMMODATION CAPACITY – IRELANDS HIDDEN HEARTLANDS



Source: Mallon Technology.



## ACCOMMODATION DISTRIBUTION – IRELANDS HIDDEN HEARTLANDS





The new legislation will allow Fáilte Ireland to deal with all types of short-term tourist lettings irrespective of the description.

This would cover accommodation such as individual rental units, accommodation units within residential properties, apart-hotels, glamping sites, etc. This will give us a truer picture of the overall capacity in the region.

In advance of the legislation being enacted, Fáilte Ireland will ensure that all necessary registration processes and procedures are in place so that property owners can quickly and easily register their properties and the online registration system is comprehensive, accurate and up to date.

The Temporary Protection Directive (2001/55 EC) was activated by EU Council Decision

EU 2022/382 of 4 March 2022, to provide immediate protection in EU countries for people displaced by the Russian invasion of Ukraine. The Government of Ireland as a member of the European Union has committed to playing its part and has contracted tourism accommodation to provide emergency accommodation.

In addition to this, applications for International Asylum have increased placing further pressure on tourism accommodation availability.

While the objective is to place people in more suitable long term accommodation, this will take time to stabilise over the lifetime of this Regional Tourism Development Strategy, given the shortage of housing availability and ongoing population growth.

## STRATEGIC FOCUS FOR ACCOMMODATION – ADDRESSING OUR STRATEGIC OBJECTIVES

**STRATEGIC OBJECTIVE 2:** BUILD ON THE RANGE AND AVAILABILITY OF COMPELLING VISITOR EXPERIENCES TO UNDERPIN THE HIDDEN HEARTLANDS BRAND PROPOSITION.

**STRATEGIC OBJECTIVE 5:** BUILD COMMITTED INDUSTRY AND STAKEHOLDER PARTNERSHIPS TO GUIDE SUSTAINABLE DESTINATION DEVELOPMENT ACROSS THE REGION.

### STRATEGIC INITIATIVES.

1. Over the period of this strategy, a number of destination-based accommodation audits will be undertaken to scope out what additional accommodation (quantity and type) is required across the region. These will inform the improvement and expansion of the accommodation sector in the region in line with the visitor strategy and its related capacity requirements, and in accordance with planning and environmental regulations. The regional team will engage with prospective accommodation developers to encourage proposals that will deliver on the above.
2. Ensure the registration of all unregistered and unapproved accommodation in the region, subject to the proposed Short-Term Letting Legislation.
3. Liaise with relevant stakeholders, in particular Local Authorities and industry, to improve the provision of camping and camper van facilities in the region in appropriate locations.
4. In association with the industry, explore ways to regenerate the B&B sector in the region, including by making the offer more attractive to angling, walking, cycling and activity-based visitors.
5. Continue to recruit additional accommodation providers into the National Quality Assurance Framework (NQAF).
6. Over the course of this strategy increase on-line visibility and digital performance for all accommodation through the Digital that Delivers Programme.

### 3.5.3. ACCESSIBILITY FOR ALL

#### RATIONALE

Accessibility is a central element of any responsible and sustainable development and is a critical component of tourism development, enabling all people to participate in and enjoy tourism experiences. Improved accessibility to basic infrastructure and tourism amenities is essential in meeting the needs and requirements of all visitors to Ireland's Hidden Heartlands. This does not only equate to providing access to those with disabilities, but it also addresses the importance of creating universally designed environments to support people with physical needs, the increasing ageing population and those who have difficulty with mobility or access to information.

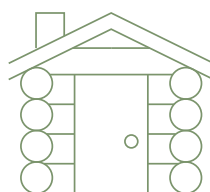
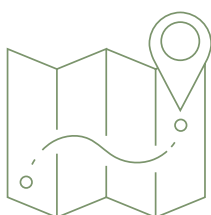
Implementing the principles of accessible tourism involves a collaborative process. Fáilte Ireland, working in partnership with public agencies, Local Authorities, NGOs and local stakeholders, will continue to use best practice in implementing the principles of universal design across all projects to ensure that all persons, regardless of their physical or cognitive needs, are able to use and enjoy all available amenities in an equitable and sustainable manner.

#### STRATEGIC FOCUS FOR ACCESSIBILITY FOR ALL – ADDRESSING OUR STRATEGIC OBJECTIVES

**STRATEGIC OBJECTIVE 5: BUILD COMMITTED INDUSTRY AND STAKEHOLDER PARTNERSHIPS TO GUIDE SUSTAINABLE DESTINATION DEVELOPMENT ACROSS THE REGION.**

##### STRATEGIC INITIATIVES.

1. Develop and create accessible facilities, infrastructure and transport in order to create an environment that is varied, stimulating and easily accessible.
2. Ensure tourism information, communications and all promotional resources used in tourism should include clear indications of accessible services and facilities.
3. Liaise with the tourism industry and our stakeholders, who play an important role in reducing potential deficiencies in access, to support training in accessibility awareness and customer care to ensure the development and promotion of tourism for all.
4. Seek to increase the availability of adapted and accessible accommodation and tourism amenities, and ensure booking services and websites are accessible for all.





### 3.5.4. TRANSPORT

#### Air and Sea Access

Air access to Ireland's Hidden Heartlands is crucial for the recovery and growth of international visitors to the region. Similarly, sea access to the major ferry ports in the region is critical to the recovery of the self-drive market in particular. We will support the route development ambitions of Ireland's air and sea ports and Tourism Ireland by providing them with the strongest possible destination and product experiences, and by working to ensure all industry partners are aware of and actively promoting routes as part of their international marketing and sales activities.

#### Influencing Visitor Flows

Influencing and adding to current visitor flow patterns is critical to the success of Ireland's Hidden Heartlands. Because of the excellent motorway and National road access through the region from Dublin, it renders the region quite permeable – many visitors simply pass through the region on their way to the Wild Atlantic Way. However, there is an opportunity by raising awareness of what the region itself offers and of building credibility of the region as an attractive destination in its own right. Coordinated initiatives and developments across the regions with easy access to the motorway and National road network will encourage the creation of new visitor flows throughout the region. The opportunity to drive flow through the region is initially in extending the day trip market in addition to encouraging stop off from the Dublin-Sligo, Dublin-Westport, Dublin-Galway and Dublin-Limerick corridors. This will be executed through the initiatives that will arise from the Destination and Experience Development Plans and, where relevant, cross border collaboration.

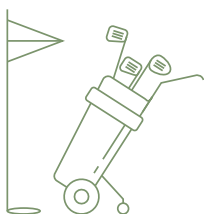
#### Public Transport & EV Charge Points Network

While the largest proportion of overseas visitors to the region will enter the region through Dublin Airport or Dublin Port, Ireland West Airport and Shannon Airport are important access gateways to Ireland's Hidden Heartlands.

Public transport to Ireland's Hidden Heartlands from Dublin and Galway Cities is strong with regular train and bus services operating. Public transport to facilitate circulation within the region, however, is weaker with relatively poor linkages between towns and the principal visitor attractions. It is very difficult for a visitor to tour the region by public transport. Some Local Link services are currently expanding their routes during the summer months to provide access to key visitor attractions from some towns.

The need for a greater roll-out of electric charge points has also become evident and there is an opportunity to grow Ireland's Hidden Heartlands' reputation as a sustainable destination by ensuring the region can be easily explored by electric vehicle. Particular attention will be paid to identifying means of supporting the hotels and key visitor attractors in installing charge points in their car parks.

Water taxi services are only beginning to emerge on the lakes of the Shannon, offering services for locals and visitors alike. It is considered that there is considerable potential to expand the range and availability of these services over the next five years.



## STRATEGIC FOCUS FOR TRANSPORT – ADDRESSING OUR STRATEGIC OBJECTIVES

**STRATEGIC OBJECTIVE 5:** BUILD COMMITTED INDUSTRY AND STAKEHOLDER PARTNERSHIPS TO GUIDE SUSTAINABLE DESTINATION DEVELOPMENT ACROSS THE REGION.

### STRATEGIC INITIATIVES.

1. Identify and activate new cross-regional strategic corridors with tour operators and other channel intermediaries as a way of stimulating new and incremental visitor flows that are aligned with the effort of DEDPs.
2. Create new industry clusters to execute DEDPs aligned to destinations and natural routes to create natural itineraries for Ireland's Hidden Heartlands to influence visitor flow and dispersion across the region.
3. Create and promote public transport itineraries as a way of accessing and exploring the region.
4. Collaborate with Local Link and the National Transport Authority in addressing linkages between towns and visitor attractions and promote Local Link routes for use by visitors.
5. Build partnerships with Ireland West Airport and Shannon Airport in promoting access to the region.
6. In conjunction with the Department of Transport and the ESB, explore the potential to provide additional EV charging points at strategic locations throughout the region. Promote locations of existing EV charging points.
7. Facilitate the establishment and expansion of water taxi services on the principal lakes on the Shannon and on other key lakes throughout the region, subject to environmental capacities and sensitivities.



McKernan Woollen Mills, Tuamgraney, County Clare.



### 3.6. PRODUCT DEVELOPMENT STRATEGY

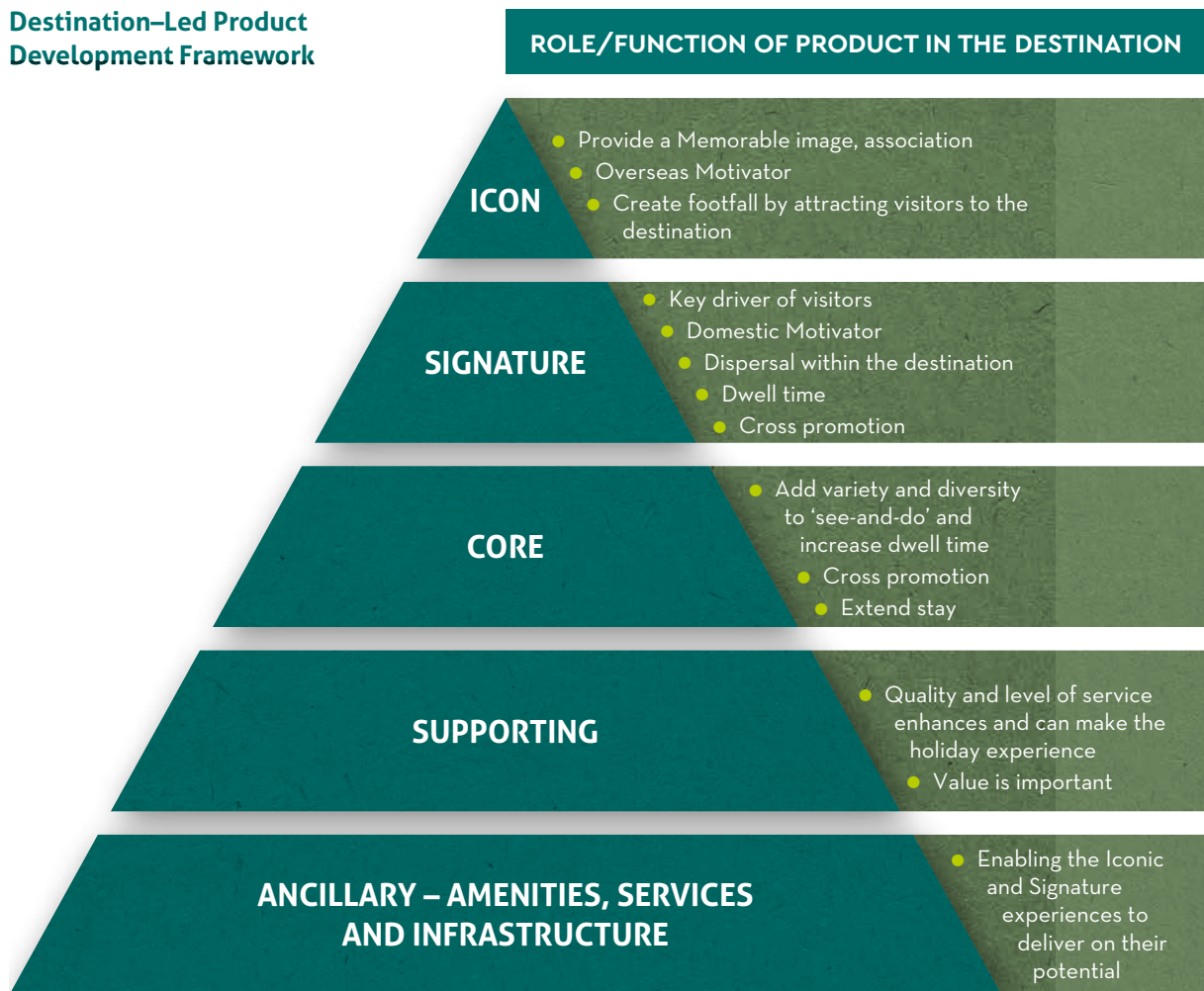
#### RATIONALE

A 'destination-led product development' approach is central to achieving the objectives of this Regional Tourism Development Strategy. It will enable the DEDPs leverage the full benefit of product development and ensure a consistent and coherent approach across all plans and with all stakeholders.

A Product Development Framework has been developed facilitating the categorisation of

product within a destination and the analysis of the function and role these play. When this is aligned with the Destination Development Framework it will ensure appropriate product development will be undertaken to meet the needs of that destination and will be guided by the destination maturity levels associated with the region

#### Destination-Led Product Development Framework



Source: Fáilte Ireland.

#### Funding Future Developments

Significant capital investment will be required in the next 10 years to deliver the brand vision for the region. Fáilte Ireland will work in partnership with key stakeholders such as Local Authorities to leverage capital investment from other Government Funding Schemes such as URDF/RRDF,

NTP, Project Ireland 2040, Shared Ireland Funds, Peace Plus, Rural Recreational schemes, and sustainable transportive initiatives to deliver on the objectives of this strategy. Delivery of this strategy is dependent on the availability of the capital funding from a range of sources.

## Strategic Partnerships

Fáilte Ireland has established strategic partnerships with State Bodies that have a key role to play in tourism – Coillte, Waterways Ireland, NPWS, OPW and the Department of Housing, Local Government & Heritage. It is the intention of Fáilte Ireland to seek a second partnership with each partner when the current partnership agreements end.

It is Fáilte Ireland's intention to establish similar partnerships arrangement with the Local Authorities over the course of this strategy. Through these partnerships, we will use the Destination-led Product Development Framework to identify future projects which support the region's brand proposition and individual destination objectives, with the agreement of all partners.

## Strategic Focus for Product Development

The core of the region along the Shannon and the Shannon–Erne corridors has a higher concentration of visitor product than other areas. In general, most of the destinations within Ireland's Hidden Heartlands are at an early stage of development. While the region has a good range of core products, its range of signature products is limited with only two iconic products – cruising on the Shannon and Center Parcs. In order to build a

stronger, more compelling visitor offering over time, the focus over the next five years will be to strengthen and consolidate the core offering of the region. Simultaneously, it will build the foundation for a wider network of connected visitor attractors throughout the region. This focus will be on Greenways and Blueways and the improvement of a number of existing visitor attractions, such as the recently revamped National Famine Museum at Strokestown Park.

In essence the high-level product development strategy for Ireland's Hidden Heartlands is articulated as follows:

*Taking an approach to regenerative tourism that places nature, heritage and communities at the heart of tourism, implement the Shannon Tourism Masterplan, complete the Beara Brefine Way, and optimize the use of the Royal and Grand Canals and the Old Rail Trail, to provide a framework of linear attractors of scale for the region; enhance the quality of the visitor experiences across a range of public and private visitor attractions; establish a strong approach to the development of eco-tourism in the region, and develop and activate a compelling network of walking, cycling and water trails that link towns and villages with attractive visitor experiences.*

## STRATEGIC FOCUS FOR PRODUCT DEVELOPMENT – ADDRESSING OUR STRATEGIC OBJECTIVES

The following strategic objectives for Ireland's Hidden Heartlands Regional Tourism Development Strategy will be addressed through our product development strategy.

**STRATEGIC OBJECTIVE 2:** BUILD OUT THE RANGE AND AVAILABILITY OF COMPELLING VISITOR EXPERIENCES TO UNDERPIN THE HIDDEN HEARTLANDS BRAND PROPOSITION.

**STRATEGIC OBJECTIVE 3:** ENABLE AND ASSIST THE INDUSTRY (PRIVATE, PUBLIC AND COMMUNITY SECTORS) TO GROW ITS CAPACITY AND CAPABILITY SO THAT IT CAN CREATE SUSTAINABLE JOBS AND INCREASE THE ECONOMIC IMPACT OF TOURISM.

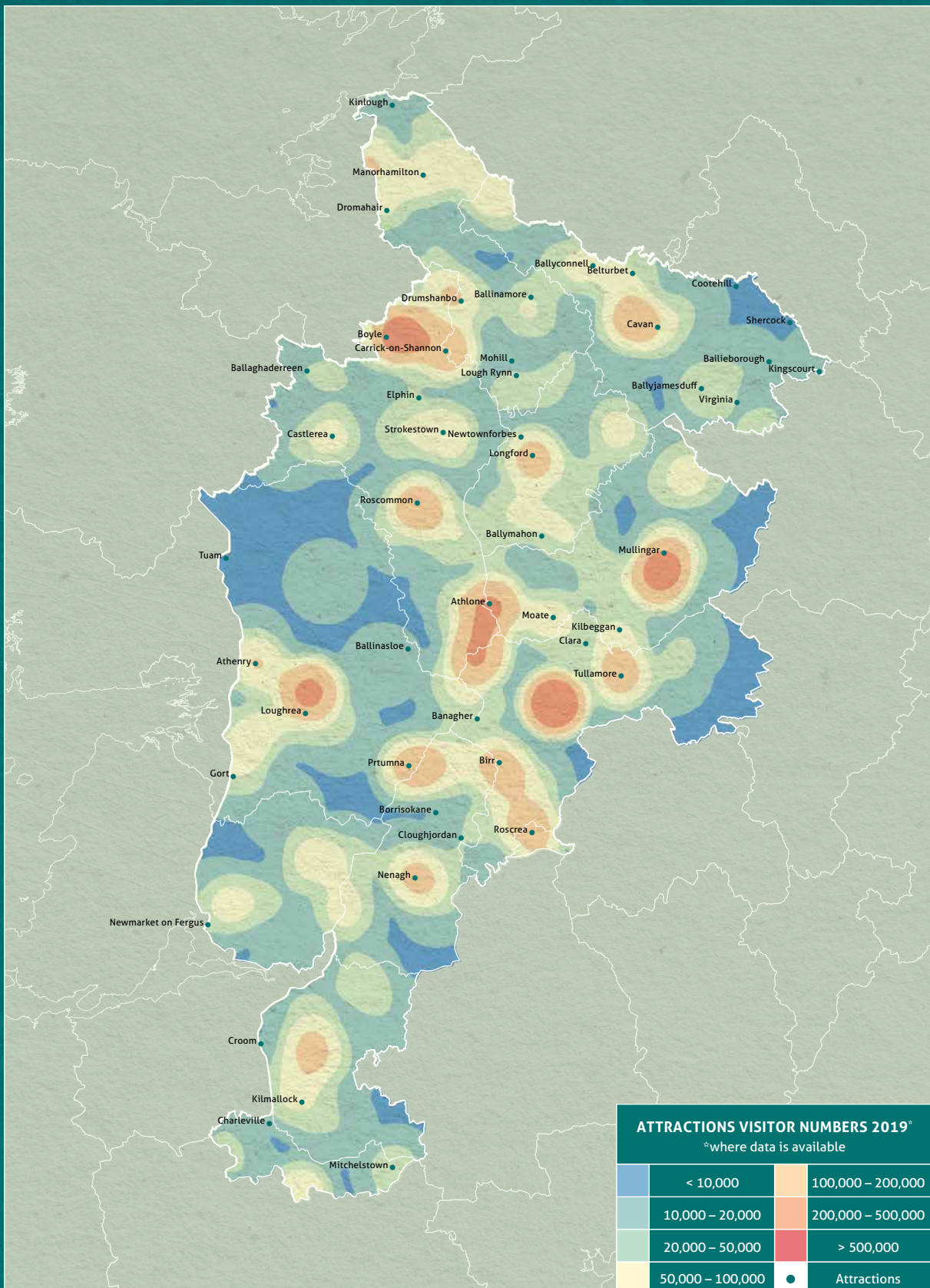
**STRATEGIC OBJECTIVE 4:** ESTABLISH THE REGION AS ONE OF THE LEADING REGENERATIVE TOURISM DESTINATIONS IN EUROPE, IN WHICH TOURISM RESULTS IN NET POSITIVE OUTCOMES FOR COMMUNITIES AND NATURE.







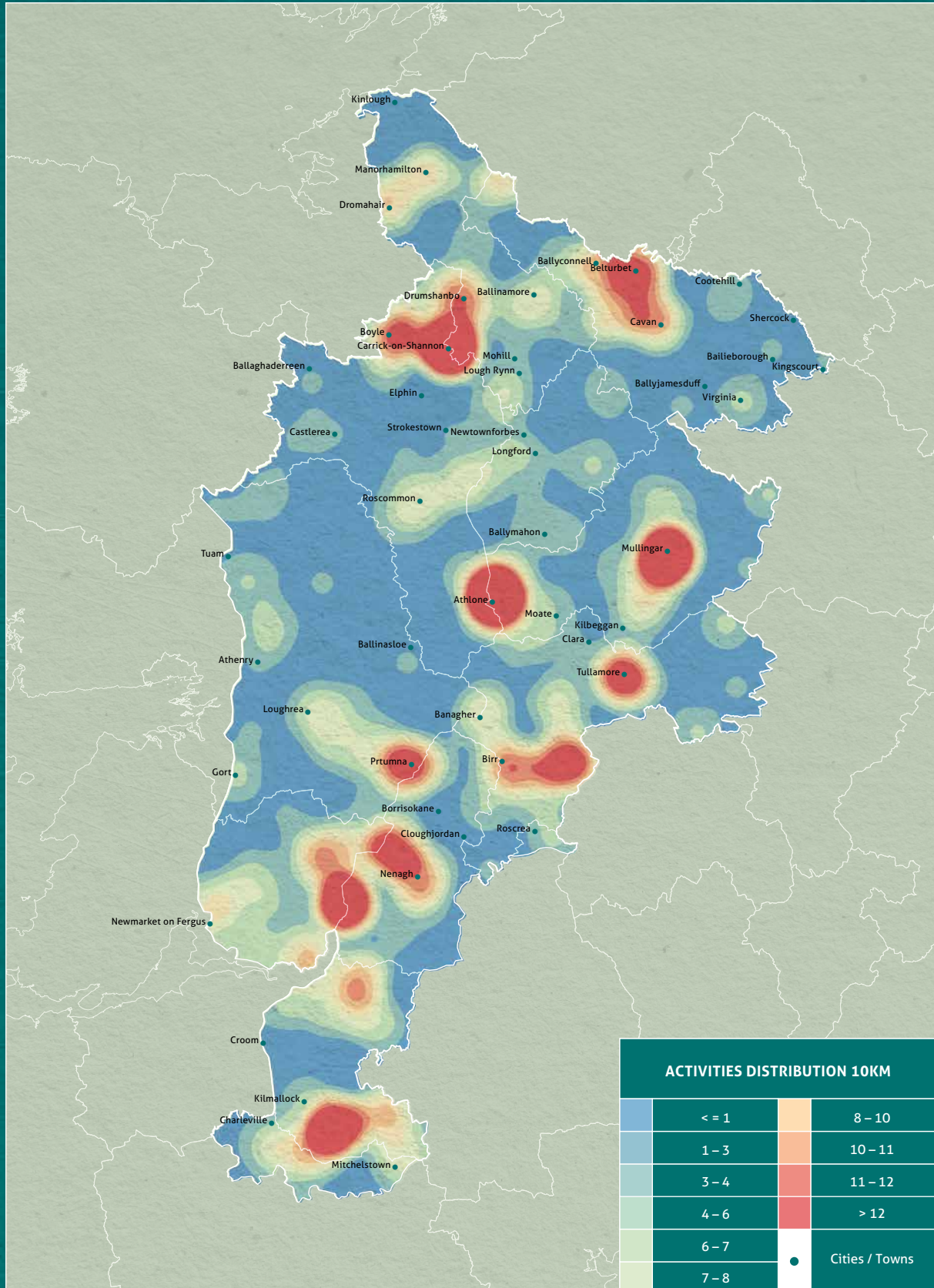
## ATTRACTIONS VISITOR NUMBERS 2019 – IRELANDS HIDDEN HEARTLANDS



Source: Mallon Technology.



## ACTIVITIES DISTRIBUTION – IRELANDS HIDDEN HEARTLANDS



Source: Mallon Technology.

## STRATEGIC INITIATIVES – VISITOR ATTRACTIONS AND ACTIVITIES

### STRATEGIC INITIATIVES.

1. Implement the **Shannon Tourism Masterplan 2020–2030** in association with Waterways Ireland and the ten Local Authorities involved. Within the Masterplan there are a number of key initiatives that will be brought forward over the next five years, including:
  - a. an assessment of marina capacity and development, with a view to increasing public mooring capacity.
  - b. a feasibility study on the future development and greening of the cruise hire fleet and the addition of cruise hire hubs.
  - c. an enhancement of the visitor experience of harbour amenities.
  - d. improvement of the attractiveness of towns and villages along the river.
  - e. increased on-water access through day boat hire.
  - f. a feasibility study for the enhancement of the Ardnacrusha visitor experience.
  - g. a range of environmental initiatives to protect the quality of the River Shannon, including bio-security measures.
  - h. adopt an eco-tourism approach to the development of tourism along the Shannon.
2. Develop the long distance **Beara Breifne Way** walking route to NTO Plus standards and facilitate its activation and animation, fully engaging the businesses along the way. It is estimated that by 2026, 75% of the route will be completed to NTO standard within the Ireland's Hidden Heartlands region.
3. Continue to develop the quality and range of the region's **heritage-based visitor experiences** with a focus in the first instance on the stock of **existing visitor attractions and experience providers**. Supports will be made available to assist visitor attractions and experience providers to improve the quality of their offering and ensure they are commercially successful. In particular, assist existing visitor attractions to sustainably use their outdoor spaces to provide nature-based, eco-tourism experiences.

Ensure that key visitor attractions which are already drawing relatively large visitor numbers (e.g. Clonmacnoise, Lough Key Forest Park, Birr Castle, The Shed Distillery, Tullamore Dew Distillery and Kilbeggan Distillery, etc.) are successful in their own right and are knitted into a local network or cluster. They will leverage them to ensure economic benefits for the wider destination and improve the attractiveness of the entire destination.

Specific projects, including the development of sustainable, signature visitor attractions for investment at a destination level will be included in the region's DEDPs. They will consider the investment required to ensure that the right tourism product is available in each destination and work with key stakeholders.

In respect of all tourism development projects, we will ensure that all potential impacts on biodiversity and ecosystem services will be avoided or minimised. For example, we will ensure that impacts on bats and other wildlife will be avoided or minimised by choosing appropriate light fittings in both urban and rural settings.



**STRATEGIC INITIATIVES.**

4. Develop and activate key **Greenways and Blueways**, including the Royal and Grand Canals, the Old Rail Trail, the Lough Derg Blueway and the Shannon Blueway. For industry activation, there will be a focus over the next five years on the Royal Canal Greenway, the Grand Canal and the Old Rail Trail, with the establishment of key hubs. They will include Mullingar (which includes two Greenways), Athlone, Longford and Tullamore, in addition to the Blueways in the region. This activation will ensure that the industry is availing of the opportunity to leverage these assets to create new enterprises and jobs.

Prepare a co-ordinated **Trail Development Strategy** for the region in association with the Local Authorities, Bord na Móna, Coillte, Waterways Ireland and National Parks and Wildlife Service, to deliver on a 'lattice-work' or network of **walking and cycling routes** throughout the region.

Undertake a Feasibility Study on the regeneration of the Tain Trail.

To ensure that all trail development is undertaken in a sustainable manner, Fáilte Ireland in conjunction with relevant partners will prepare, early in 2023, a guidance document on the protection of the natural heritage in planning, constructing, maintaining and managing recreational trails in Ireland.

5. **Local Authorities** are key partners for Fáilte Ireland in the sustainable development of tourism in the region and in the protection of key environmental resources and the support of local communities. We will work together to deliver key tourism infrastructure projects, utilising a range of funding sources. We will also work together to leverage the wider benefits from a range of Fáilte Ireland funded capital projects underway and completed, including the National Famine Museum at Strokestown Park House; the Shannon Pot / Cavan Burren; Belvedere House, Gardens & Park; Granard Heritage Park; and Water Sports Facilities at Ballycuggeran, Co Clare & Dromineer, Co Tipperary on Lough Derg and at Acres Lake in Drumshanbo, Co Leitrim. We will work with Local Authorities on RRDF / URDF and Towns and Village Renewal Schemes to deliver improved amenities and attractions for influence the visitor. We will also deliver on Fáilte Ireland funded Destination Towns scheme. We will also support Local Authorities to develop appropriate commercial operating models for visitor attractions within their remit.

6. Fáilte Ireland has established **strategic partnerships with State bodies** that have a key role to play in tourism - Coillte, NPWS, OPW & the Department of Housing, Local Government & Heritage (DHLGH), Waterways Ireland. These partnerships are critical to the Ireland's Hidden Heartlands region given the range of iconic natural assets and heritage attractions.

Priority Site Masterplans to be prepared and implemented under these partnerships include:

- Clonmacnoise (OPW)
- Lough Key Forest Park (Coillte and Roscommon County Council)
- Killykeen Forest Park (Coillte)

Work with the local authorities, Coillte and NPWS and industry through a partnership approach to help the Slieve Blooms and Ballyhoura to realise their potential as outdoor recreation destinations to enhance the visitor experience and provide direction for future action, implementation, resources, and investment over the next three to five years.

**STRATEGIC INITIATIVES.**

**7. Develop a wider range of sustainable nature-based and eco-tourism experiences.** Eco-tourism is a form of sustainable tourism defined as “forms of tourism which actively contributes to the protection of natural heritage” according to the World Tourism Organisation (UNWTO). Based on the outstanding environmental qualities of the Hidden Heartlands, there is significant merit in developing the region as a model of ecologically sustainable tourism.

There is scope to expand existing offerings such as ‘Slow Adventure’ in Leitrim throughout the region to ensure that increased tourism activity is linked to environmental appreciation and ecological awareness of the region’s hidden places. Key to enhancing such awareness is networking of activity operators and promotion of responsible behaviours by service providers, residents and visitors alike through an agreed Code of Practice.

The ambition is to create a range of sustainable nature-based and eco-tourism experiences throughout the region associated with rivers, lakes, woodlands, bogs, peatlands and wetlands as distinctive and unique core attractors in the region, in association with the NPWS and local communities that care for them.

Explore the potential of a signature eco-tourism product of scale linked to the region’s peatlands, bogs and wetlands.

Develop opportunities for eco-tourism or slow tourism clusters to be established throughout the region, based on the models of the Burren Eco-tourism Network in Co. Clare and the Slow Adventure network in Co. Leitrim.

Establish a sustainable tourism / eco-tourism toolkit for tourism businesses and a code of practice that will be a requirement to become a sustainable tourism destination.

**8.** Continue to invest in the region’s contemporary **cultural assets such as festivals, music and food** to animate the proposition ensuring the region’s destinations are perceived as fun and vibrant. In particular, develop the tourism potential of our cultural heritage, such as local music, arts and crafts, etc. which are rooted in local communities and provide a distinctive and unique offering to visitors. In this way, tourism can contribute to the maintenance of these aspects of our cultural heritage. Further details on these initiatives will be developed through the Destination and Experience Development Plans (DEDPs).

**9. Food tourism experiences** provide opportunities for visitors to engage with food provenance, the heritage and culture of a place, its communities and the people behind the local food stories. While some special interest visitors travel specifically for food, a considerable proportion of visitors engage with food experiences as part of their overall destination experience.

**10.** Support the development of **food networks and trails** across the region, particularly those that can showcase the wealth of artisan food producers in the region. Encourage the development of strong food-related experiences and the cross-promotion and cross-selling of these experiences.

**11.** Tidy up, consolidate and regularise the many iterations of **tourist information, way-finding and interpretative signage** (as distinct from directional road signage) that have been developed over the past few decades and introduce a streamlined and more user friendly system. To this end, undertake a tourist signage audit, leading to a new tourist signage strategy for the region in association with the Local Authorities.

*Note: The delivery of the above product development strategy will be dependent on the availability of capital funding from a range of sources, including Fáilte Ireland.*



### 3.6.5. FESTIVALS AND EVENTS STRATEGY

#### RATIONALE

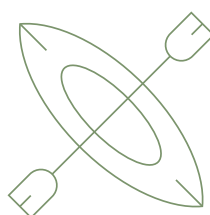
Fáilte Ireland's strategic objective for festivals is to focus on developing festivals and events that are at a level to generate a scale of impact that increases both dwell time and economic impact.

As key motivators for the local, domestic, and international consumer, festivals and events will have the potential to motivate visitors outside of 'hotspots' and at off-peak times of the year.

In line with its **Destination Maturity Model**, Fáilte Ireland will look to support festivals and events that can best serve the objectives of a destination based on its maturity stage.

For example, smaller festivals (both local and community) can aid awareness raising efforts in a destination and the promotion of a positive destination image, particularly in the case of lesser known destinations. This is particularly important in the context of Ireland's Hidden Heartlands where awareness levels are relatively low among visitors.

We will continue to work with a few Festivals that have USP's and offerings that are unique to Ireland's Hidden Heartlands. We will help them build stronger networks of their own through targeted domestic and, later in their lifecycle, through international supports. By raising awareness of these Festivals, Ireland's Hidden Heartlands will become synonymous with its own unique portfolio of Festivals.



*All applications for funding under this Strategy must demonstrate compliance with its environmental measures, including the 'Environmental Management for Local Authorities and Others' at Appendix A4.*

## STRATEGIC FOCUS FOR FESTIVALS – ADDRESSING OUR STRATEGIC OBJECTIVES

**STRATEGIC OBJECTIVE 2:** DEVELOP THE REGION INTO A MORE ATTRACTIVE AND COMPELLING PLACE TO VISIT.

### STRATEGIC INITIATIVES.

1. The focus of the Ireland's Hidden Heartlands strategy is on leveraging the natural assets to deliver fun and active experiences. By participating in the Developing Festivals Scheme (innovation and outdoor active) we will identify outdoor participative events that showcase the region, attract domestic and international visitors in the shoulder season, increase bed-nights, benefit the local economy and raise awareness of the area internationally.
2. Identify a number of existing Festivals throughout the Regions and support them through the Developing Festivals Scheme, this will fast track them into attracting domestic and later international audiences.
3. Continue to work with local authorities on the Regional Festival Fund and focus our investment in local and community tourism focused Festivals that are aligned to DEDPs.
4. Collaborate with Local Link and the National Transport Authority in addressing linkages between towns and visitor attractions and promote Local Link routes for use by visitors.

## 3.7. INDUSTRY DEVELOPMENT STRATEGY

### RATIONALE

The impact of the Covid-19 pandemic on the tourism industry has been unprecedented. The industry, however, has proven once again just how resilient it can be in the face of adversity and it is already on the road to recovery.

The recovery and growth phases post-Covid require support to ensure that the sector can survive to thrive over the period of this strategy. No tourism business in the region will be without access to relevant capability-building supports. These supports will be activated over the course of the economic cycle, progressing from measures focused on business survival, to recovery and onto supporting sustainable growth strategies.

We will also ensure our tourism industry partners are primed to deliver on the agreed outputs of their Destination and Experience Development Plan resulting in a step change for the destination.

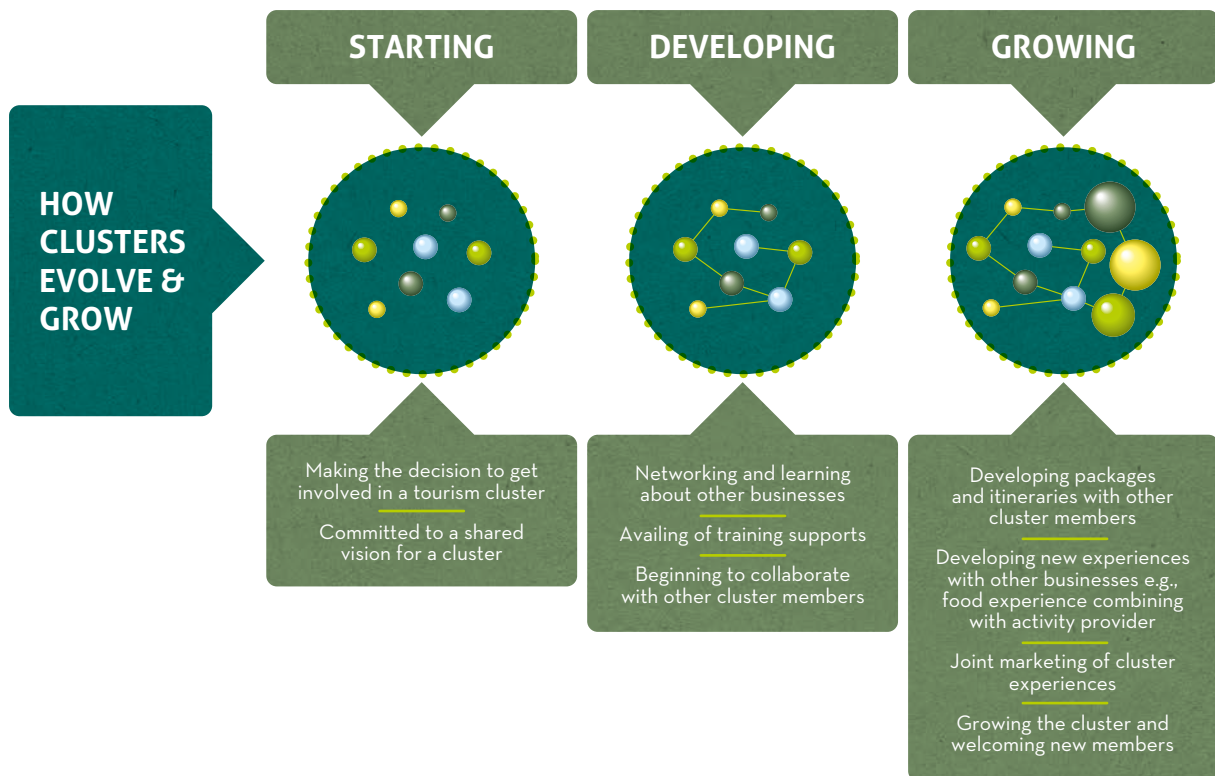
Given that the destinations in the Hidden Heartlands region are either at 'Aspiring' or 'Pioneering' levels of destination maturity, there will be a particular emphasis over the next five years on establishing and growing destination-based business networks and clusters to encourage greater levels of cross-promotion and cross-selling within each destination.



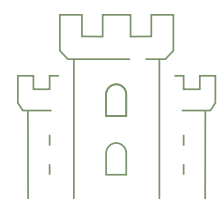
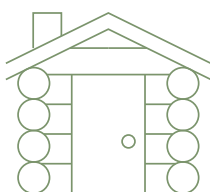
**OUR CORE FOCUS FOR ENTERPRISE SUPPORTS OVER THE PERIOD OF THIS STRATEGY WILL BE IN THE FOLLOWING AREAS:**

**TOURISM ACCOUNT MANAGEMENT** - THE IRELAND'S HIDDEN HEARTLANDS REGIONAL TEAM WILL ENGAGE WITH INDUSTRY ON A REGULAR BASIS THROUGH AN ACCOUNT MANAGEMENT PROCESS TO PROVIDE A STREAMLINED AND SUPPORTIVE TWO-WAY COMMUNICATION, AND ENGAGEMENT STRUCTURE WITH KEY TOURISM BUSINESSES IN THE REGION

**NETWORK AND CLUSTER DEVELOPMENT** - CROSS-COUNTY, COMMERCIALY FOCUSED TOURISM NETWORKS WILL BE ESTABLISHED FOR EACH DEDP. THEY WILL BE COMPLEMENTED BY SMALLER CLUSTERS AS APPROPRIATE, DESIGNED TO IMPROVE DESTINATION COMPETITIVENESS THROUGH MORE EFFECTIVE CROSS-PROMOTION AND CROSS-SELLING AMONG BUSINESSES. A CLUSTER DEVELOPMENT PROGRAMME WILL BE PUT IN PLACE TO PROVIDE NETWORKS AND CLUSTERS WITH THE SUPPORTS THEY REQUIRE RELATIVE TO THE RELEVANT DESTINATION MATURITY LEVEL

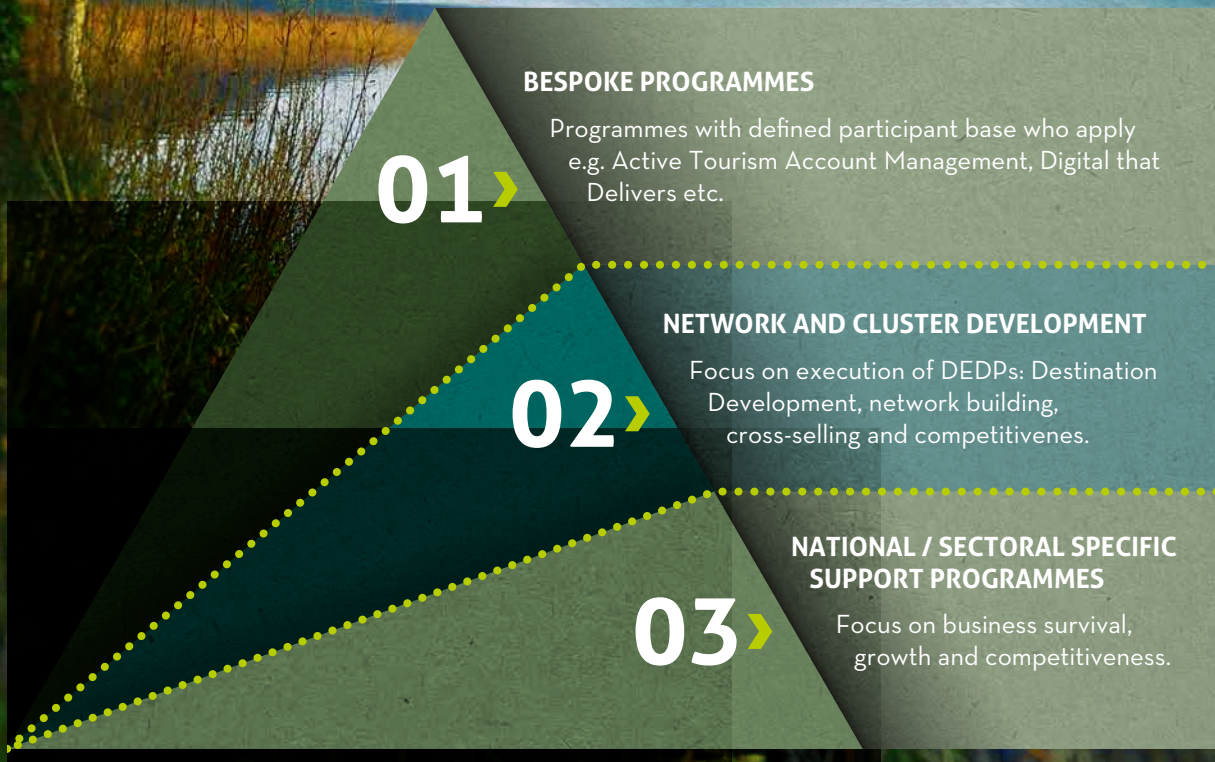


Source: Repucon Consulting.

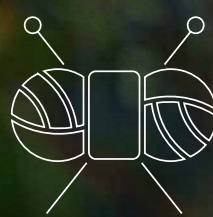




**NATIONAL SUPPORT PROGRAMMES - FÁILTE IRELAND WILL CONTINUE TO DELIVER NATIONAL AND SECTORAL SPECIFIC PROGRAMMES BASED ON THE PRIORITISED NEEDS IDENTIFIED THROUGH ENGAGEMENT WITH INDUSTRY AND THE NEEDS OF THE DESTINATIONS**



Source: Fáilte Ireland.





## STRATEGIC FOCUS FOR INDUSTRY DEVELOPMENT – ADDRESSING OUR STRATEGIC OBJECTIVES

**STRATEGIC OBJECTIVE 3:** ENABLE AND ASSIST THE INDUSTRY (PRIVATE, PUBLIC AND COMMUNITY SECTORS) TO GROW ITS CAPACITY AND CAPABILITY SO THAT IT CAN CREATE SUSTAINABLE JOBS AND INCREASE THE ECONOMIC IMPACT OF TOURISM.

**STRATEGIC OBJECTIVE 5:** BUILD A COMMITTED INDUSTRY AND STAKEHOLDER COALITION TO GUIDE SUSTAINABLE DESTINATION DEVELOPMENT ACROSS THE REGION.

### STRATEGIC INITIATIVES.

1. Survive to thrive – Provide a range of training and mentoring supports to tourism businesses in the region to ensure that they survive to thrive over the period of this strategy and no significant providers close down due to the effects of the pandemic over the next five years.
2. Establish a revamped Tourism Account Management process within the region and deliver targeted supports to key businesses that will benefit the wider destination.
3. Establish an effective tourism business network for each of the proposed Destination and Experience Development Plan (DEDP) areas across the region, supported by smaller destination-based clusters as appropriate.
4. Deliver multi-annual, multi-modular development programmes for each of the cross-county and commercially focused tourism networks that have been established in Ireland's Hidden Heartlands and supported by further clusters at destination level. These programmes will be tailored to the relevant maturity level of each destination. Establish strong and effective networks in advance of the preparation of each proposed DEDP.
5. Support the work of county-based industry networks and other clusters.
6. Engage with tourism businesses in rolling out an ecotourism toolkit for tourism businesses, together with a code of practice and a training programme.
7. Support the industry to increase the number of saleable experiences that are available to the domestic and overseas markets in the region.
8. Ensure the engagement of tourism businesses in the region with the new Fáilte Ireland online Business Supports Hub to ensure that they have access to relevant business supports and content that can be consumed at a pace that they can control.
9. Build awareness among tourism businesses of LEO and ETB training programmes and courses and ensure the complementarity of all industry supports and services.
10. Fáilte Ireland will work with a number of other State Agencies, such as SEAI, and industry groups to support the industry in reaching its carbon reduction targets. We will also support the uptake of sustainability measurement and certification programmes at both enterprise and destination levels.

### 3.8. DISTRIBUTION AND BUSINESS DEVELOPMENT STRATEGY

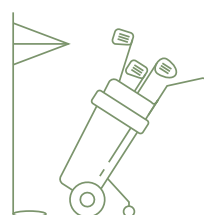
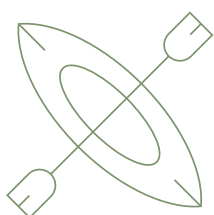
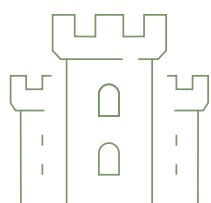
#### RATIONALE

Sales Distribution Plans will be prepared for each Destination and Experience Development Plan (DEDP) in Ireland's Hidden Heartlands over the next five years in accordance with the level of maturity of each destination. Fáilte Ireland will work with the industry to shape their products for different distribution channels and build their sales and contracting skills in advance of engaging buyers. Given that the destinations in

Ireland's Hidden Heartlands are generally at an early stage of destination maturity, the focus of the Distribution Plans will be to build on existing progress made with the domestic market and to gain a foothold in key overseas markets, particularly GB, France, Germany and the US. With over 50 attendees at Meitheal in 2022, we have a good base of internationally market-ready experiences in the region, but continued growth is required.



Source: Fáilte Ireland.





At the level of the firm, the maturity will also be indexed based on the saleable experience. Some key businesses are already very active in overseas markets and, in some cases, wholly dependent on them. We will work closely with these businesses to help with market growth and diversification over the

next five years. The Distribution Plans will support a shift in the current (2019) visitor distribution map and will work to create new itineraries to incrementally shift visitor flows creating more overnights by visitors in Ireland's Hidden Heartlands.

## STRATEGIC FOCUS FOR DISTRIBUTION AND BUSINESS DEVELOPMENT – ADDRESSING OUR STRATEGIC OBJECTIVES

**STRATEGIC OBJECTIVE 1:** RAISE AWARENESS AND RECOGNITION OF THE REGION AMONG DOMESTIC AND INTERNATIONAL VISITORS AND INCREASE THE DURATION OF VISITOR STAYS, PARTICULARLY DOMESTIC.

**STRATEGIC OBJECTIVE 3:** ENABLE AND ASSIST THE INDUSTRY (PRIVATE, PUBLIC AND COMMUNITY SECTORS) TO GROW ITS CAPACITY AND CAPABILITY SO THAT IT CAN CREATE SUSTAINABLE JOBS AND INCREASE THE ECONOMIC IMPACT OF TOURISM.

**STRATEGIC OBJECTIVE 5:** BUILD COMMITTED INDUSTRY AND STAKEHOLDER PARTNERSHIPS TO GUIDE SUSTAINABLE DESTINATION DEVELOPMENT ACROSS THE REGION.

### Digital that Delivers Programme

Fáilte Ireland will work to support tourism businesses to enhance their digital presence and capability through its Digital That Delivers Programme, building on the success of the Hidden Heartlands Website Improvement Programme. The initial focus will be on the Attractions, Activities and Tour Operator businesses. Research has indicated this is where the greatest opportunity lies in the short-term. From there, we will work to support other sectors of the industry subject to the required funding being made available by Government.

The programme will provide businesses with technical and practical support to drive operational efficiencies through new technologies. It will educate participants on how to distribute products via third party channels such as online travel agents (OTAs), aggregators and tour operators. It will allow them enhance their own websites and digital marketing content, while also optimising their digital channel performance.



**STRATEGIC INITIATIVES.**

1. Continually gather insights from buyers in order to inform the development or refinement of saleable visitor experiences within the region.
2. Prepare a Distribution Plan for each DEDP prepared for destinations in Ireland's Hidden Heartlands. Given that these destinations are either at the Pioneering or Aspiring stages of maturity, the focus will be to build on existing domestic market success and gain entry to the international market.
3. Activate new cross-regional strategic development corridors with tour operators and other channel intermediaries as a way of stimulating new and incremental visitor flows aligned with the efforts of DEDPs. In Ireland's Hidden Heartlands, these are:
  - a. North-West Strategic Corridor along the N3 and N4, featuring the hubs of Mullingar, Carrick-on-Shannon and Cavan.
  - b. Western Strategic Corridor along the N5 and M6, featuring the hub of Athlone.
  - c. South-West Strategic Corridor along the M7, featuring Lough Derg.
4. Provide the Irish Based Inbound Agents (IBIA) with a continual flow of 'new news' about Ireland's Hidden Heartlands (particularly about new experiences and products) in order to support their destination programming. These engagements offer a two-way communication flow of information which is critical to both our development agenda and the success of our IBIA partners in a crowded and competitive marketplace.
5. Niche products including golf and angling will be repositioned and promoted within the wider Hidden Heartlands offering given their potential to support both geographic and seasonal dispersal. Position and promote golf in the Hidden Heartlands as a high quality, value-for-money, parkland offering. Promote the angling offering to key target markets and liaise with Inland Fisheries Ireland on the implementation of their new corporate strategy as it relates to the region.
6. Target international and domestic small scale tour operators that specialise in sustainable, responsible and eco-tourism experiences and work with the industry in creating bespoke itineraries to meet their needs.
7. Provide additional sales opportunities to those businesses that have a sustainability certification.
8. Provide multiple opportunities for experience providers to engage with Irish based inbound agents across a range of in-Ireland platforms.
9. Implement the Fáilte Ireland Digital that Delivers Programme to significantly enhance the ability of industry to target consumers at each stage of their path to purchase.
10. Explore the potential to develop a single real-time digital portal for the region that will provide visitor information on events.
11. Through the Brand Collaboration Group, Fáilte Ireland will work closely with Tourism Ireland to identify and co-ordinate market based promotional and publicity opportunities and to ensure that Tourism Ireland has full information on all destination and product developments to inform its overseas trade marketing programmes.



## 3.9. MARKETING STRATEGY

### RATIONALE

The overall domestic marketing objective is to motivate more adults across the island of Ireland to increase their consideration and

intention to take a break in Ireland's Hidden Heartlands by inspiring them to visit the region.

### STRATEGIC FOCUS FOR MARKETING – ADDRESSING OUR STRATEGIC OBJECTIVES

**STRATEGIC OBJECTIVE 1:** RAISE AWARENESS AND RECOGNITION OF THE REGION AMONG DOMESTIC AND INTERNATIONAL VISITORS AND INCREASE THE DURATION OF VISITOR STAYS, PARTICULARLY DOMESTIC.

**STRATEGIC OBJECTIVE 4:** ESTABLISH THE REGION AS ONE OF THE LEADING REGENERATIVE TOURISM DESTINATIONS IN EUROPE, IN WHICH TOURISM RESULTS IN NET POSITIVE OUTCOMES FOR COMMUNITIES AND NATURE.

### MARKETING PROGRAMMING

Ireland's Hidden Heartlands marketing programming and communications activity will be executed through the following mechanisms:

1. **External Marketing** - Sustained demand generation activity growing our domestic leisure tourism base through innovative regional brand and destination marketing programming.
2. **Internal Marketing** - Develop the profile of Ireland's Hidden Heartlands among the tourism industry through continuous engagement at an individual level and through DEDP development clusters.
3. **Alliance Marketing** - Develop a level of marketing scale through strategic marketing alliances with our broader tourism network including tourism industry, Local Authorities, State bodies and National partnerships and sponsorships.
4. **Partner collaboration and PR** - Ensure sustained communications with all key tourism influencers including ITOA, Travel Media, online influencers, leisure tourism specialists.
5. **Digital Marketing** - Embrace digital as the basis for destination marketing innovation and brand development.
6. **International Marketing** - Increase the levels of international engagement with the brand through strong collaboration with Tourism Ireland.

## DOMESTIC MARKETING

The Ireland's Hidden Heartlands brand has had a very positive start since its launch in 2018. In 2021, the intent to travel to the region was 33% among the domestic audience. The overall domestic marketing objective is to get more adults across the island of Ireland who are currently very routine in their holiday habits to increase their consideration and intention to take a break in Ireland's Hidden Heartlands and inspire them to visit the region.

The domestic visitor accounts for 56% of all trips taken in Ireland and 32% of the total tourism economy and is valued at an estimated €2.4 billion of revenue in 2019. The importance of our domestic visitors in our regions is particularly evident with 84% of all domestic trips to destinations outside of Dublin. Domestic and NI consumers take trips all year round making them a crucial contributor to extending the tourism season throughout the year thereby providing sustainable (i.e. year-round) quality employment.



Source: Fáilte Ireland.



**STRATEGIC INITIATIVES.**

1. Through its domestic marketing campaign, Fáilte Ireland will seek to:
  - Increase visitation to Ireland's Hidden Heartlands during the summer season and the shoulder season, thereby extending the season.
  - Increase penetration in the region through building consideration and intent.
  - Increase the social media profile of Ireland's Hidden Heartlands across all channels.
  - Increase trade referrals from discoverireland.ie to industry websites.
  - Target niche markets that are important to the region, such as angling and walking.
  - Target market segments interested in eco-friendly travel and ecotourism.
2. Provide additional marketing opportunities to tourism providers that have sustainability certification.
3. Through sustained local engagement, seek to optimise the alignment between Fáilte Ireland campaigns and those of other local stakeholders / destination marketing group, etc.
4. Focus on converting first-time visitors to repeat visitors by, among other things, working with businesses to help them target previous visitors.
5. Marketing at the level of the business: Build out imagery, video and marketing supports on Ireland's Content Pool and FáilteIreland.ie. Industry can use this to leverage Fáilte Ireland's campaigns in addition to supporting individual business marketing and sales activities.

**OVERSEAS MARKETING**

Through the Brand Collaboration Group, Fáilte Ireland will partner with colleagues in Tourism Ireland to ensure they have a steady flow of 'new

news' to help support their overseas markets consumer marketing activities. Both agencies will also pool Ireland's Hidden Heartlands destination and product content to support Irish industry in its own marketing and sales development efforts

**STRATEGIC INITIATIVES.**

1. Raise the international profile of Ireland's Hidden Heartlands to increase visitation and revenue.
  - a. Drive incremental tourism revenue through sustained promotion domestically and internationally.
  - b. Create a more sustained partnership and focus with Tourism Northern Ireland and Tourism Ireland to better partner on Ireland's Hidden Heartlands, Fermanagh Lakelands and the Cuilcagh Lakelands Geopark - for the mutual benefit of all.
2. Fáilte Ireland will liaise with Tourism Ireland on their international marketing for Ireland's Hidden Heartlands, including continuing the work of the brand collaboration group between Tourism Ireland and Fáilte Ireland through which further opportunities will be identified.
3. Tourism Ireland will actively promote Ireland's Hidden Heartlands internationally to drive increased overseas revenue.
4. Increase utilisation of all digital marketing assets by the industry.
5. Deliver on the new overseas visitor segmentation model once it has been devised, which will highlight core opportunities for the region, with a particular focus on sustainable tourism and eco-tourism.
6. Provide tourism businesses with sustainable tourism certification with enhanced profile across Fáilte Ireland and Tourism Ireland marketing platforms and campaigns.

### 3.10. COMMUNITY REGENERATION

The culture, heritage and way of life of the people that live in the Midlands is what visitors to the area want to engage with. Tourism should be a positive and regenerating force, contributing to the creation of flourishing places and thriving communities. It should be valued by local communities for the contribution that it makes to them directly by creating sustainable jobs, opportunities for enterprise and better places to live, and by extension making them more attractive places to visit.

In all of the Strategic Initiatives listed below relating to community engagement, the Local Authority Tourism Officers will be a key liaison with communities as they work closely with them on a day to day basis.

#### Tourism Approval Rating

Each year, Fáilte Ireland undertakes a national survey to gauge the level of public support towards domestic and overseas tourism among local communities throughout every county in Ireland. The Tourism Approval Rating (TAR) is calculated through this survey. Public support for tourism in Ireland has reduced in the 12 months up to June 2021 compared with the previous year (July 2019 – June 2020), demonstrating the negative impact Covid-19 has had on residents' attitudes. However, Ireland's Tourism Approval Rating (TAR) score remains positive, with Irish residents either approving of or accepting tourism and is scoring significantly above New Zealand and Australia. Most Irish residents continue to agree that they personally benefit from tourism. While some believe they have experienced some adverse impact from tourism activity in their local area, most believe that enough action has been taken to address those issues.

#### Community Tourism Enterprises

In 2019, research was commissioned into the nature and socio-economic impacts of community-based tourism across Ireland's Hidden Heartlands. Due to the relatively low levels of visitation, the region relies heavily on the community tourism enterprise sector to provide many of its visitor experiences. These experiences, by their nature, display very high levels of authenticity.

<b>59</b>	Number of community tourism enterprises and projects examined in IHH.
<b>469,000</b>	Number of Visitors to community tourism enterprises.
<b>70%</b>	Percentage of domestic visitors.
<b>30%</b>	Percentage of overseas visitors.
<b>37</b>	Number of full-time jobs supported by community tourism enterprises.
<b>103</b>	Number of part-time jobs supported by community tourism enterprises.
<b>898</b>	Number of volunteers supporting efforts of community tourism enterprises.
<b>€18.2m</b>	Total direct value by community tourism enterprises.
<b>€12.74m</b>	Total 'public good' added value generated by community tourism enterprises.
<b>€30.94m</b>	Combined Value generated by community tourism enterprises.

The challenges facing the sector include a lack of strategic planning and business management, access to capital and operational funding, rising insurance costs, a need for succession planning and a lack of capacity for commercialisation of opportunities.

Enhanced capacity building and activation for improved market accessibility will help to build a vibrant regional destination by strengthening authentic community experiences. By providing easy access for visitors to meet local people, hear stories and interact with nature, cultural heritage and outdoor activities, the overall brand proposition of Ireland's Hidden Heartlands will be significantly strengthened.

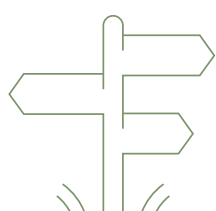


## STRATEGIC FOCUS FOR COMMUNITY ENGAGEMENT – ADDRESSING OUR STRATEGIC OBJECTIVES

**STRATEGIC OBJECTIVE 5:** BUILD A COMMITTED INDUSTRY AND STAKEHOLDER COALITION TO GUIDE SUSTAINABLE DESTINATION DEVELOPMENT ACROSS THE REGION.

### STRATEGIC INITIATIVES.

1. Continue to build on the goodwill towards tourism among local communities in the region by ensuring that they are involved in all decisions that could impact them. Ensure that any concerns about potential negative impacts of tourism on local communities are highlighted and addressed at an early stage.
2. Provide mentoring and training for key community tourism enterprises to improve their operational, commercial, planning and governance skills in partnership with relevant agencies. Utilise Fáilte Ireland's Tourism in the Community: A Business Toolkit for Community Tourism Projects, in working with local community tourism projects.
3. Explore ways of leveraging community-based tourism initiatives to build loyalty among visitors.
4. Keep local communities informed about any Ireland's Hidden Heartlands initiatives that may be of benefit to them.
5. Ensure that tourism is one of the sectors that will contribute to the success of the Just Transition initiative, ensuring that it contributes to the creation of sustainable jobs for local communities.
6. Support a number of key demonstrator projects (e.g. the Rathcroghan 'landscape partnership') that provide a blueprint for community-led regenerative tourism projects.
7. Engage local communities as appropriate in relevant interpretation projects that involve their local heritage and culture, in association with other relevant agencies and bodies, to create opportunities for local communities to present and share their own culture, traditions and heritage with visitors to their area.
8. To work with local communities and local tourism providers, to explore opportunities to introduce elements of the heritage of the Midlands, particular of the Shannon and the bogs, into existing and new tourism offerings in a way that creates a richer, more authentic and more engaging cultural experience for visitors.
9. To provide assistance to Irish Rural Link and the Community Wetlands Forum towards the achievement of the objectives of the 'Connecting Communities with Peatlands' project which is funded by the National Just Transition Fund. In particular, provide training and mentoring as required and appropriate to the project to help communities to optimize the regenerative tourism potential of the projects.



## 3.11. ENVIRONMENTAL PROTECTION & PROMOTION

### RATIONALE

The Regional Tourism Development Strategy for Ireland's Hidden Heartlands also provides a new context for how all existing and future tourism projects and initiatives are planned, developed and managed in a sustainable and integrated manner. The VICE (Visitor, Industry, Community and Environment) Model for Sustainable Tourism is the framework adopted within this plan. The pursuance of 'regenerative tourism' in this strategy for the region ensures the needs of the environment and of local communities be prioritised and that

tourism works to create flourishing areas and thriving communities. Fáilte Ireland recognises the need to integrate environmental considerations into this strategy in a way that responds to the sensitivities and requirements of the wider natural environment. Environmental considerations including water quality and amenity, climate change, traffic, biodiversity, built and cultural heritage, landscape, critical infrastructure and communities, all play a vital part in our tourism sector.

### STRATEGIC FOCUS FOR ENVIRONMENTAL SUSTAINABILITY – ADDRESSING OUR STRATEGIC OBJECTIVES

**STRATEGIC OBJECTIVE 4:** ESTABLISH THE REGION AS ONE OF THE LEADING REGENERATIVE TOURISM DESTINATIONS IN EUROPE, IN WHICH TOURISM RESULTS IN NET POSITIVE OUTCOMES FOR COMMUNITIES AND NATURE.

**STRATEGIC OBJECTIVE 5:** BUILD COMMITTED INDUSTRY AND STAKEHOLDER PARTNERSHIPS TO GUIDE SUSTAINABLE DESTINATION DEVELOPMENT ACROSS THE REGION.

### Strategic Approach

The protection, enhancement and promotion of our most important tourism asset, the natural environment, has been an integral part of the formation of this strategy as is evidenced in the following:

- Environmental assessments and resulting measuring and monitoring;
- A firm commitment to ensuring sustainable and responsible tourism principles are practiced;
- Compliance with statutory decision making and consent granting at strategy implementation stage;
- Ensuring all DEDPs are screened and where appropriate have full environmental assessments completed; and
- Integrating requirements for environmental protection and management.

This strategy is aligned alongside a hierarchy of

statutory documents setting out public policy for land use development, tourism, infrastructure, sustainable development, environmental protection and environmental management. These include the National Planning Framework (NPF), Regional Spatial and Economic Strategies (RSESs) and lower tier Development Plans as well as Local Area Plans and other relative strategies and plans including the National Peatlands Strategy, the National Raised Bog SAC Management Plan and the National Pollinator Plan.

Implementing the strategy will involve Fáilte Ireland helping to facilitate, promote, support and coordinate stakeholders (including local authorities, other government agencies, tourism operators, site owners and operators, communities and visitors) in their activities in a way that is consistent with existing and emerging plans that have been subject to environmental assessment. The strategies do not provide consent, establish a framework for granting consent or contribute towards a framework for granting consent.



Implementation of the Strategy shall be consistent with and conform with the NPF, RSEs and lower-tier land use plans, including provisions relating to sustainable development, environmental protection and environmental management that have been integrated into these documents including through SEA and AA processes. In order to be realised, projects included in the Strategy (in a similar way to other projects from any other sector) will have to comply, as relevant, with various legislation, policies, plans and programmes (including requirements for lower-tier Appropriate Assessment, Environmental Impact Assessment and other licencing requirements green procurement procedures as appropriate) that form the statutory decision-making and consent-granting framework, of which the Strategy is not part and does not contribute towards.

Having undergone screening, the strategies are subject to: Strategic Environmental Assessment (SEA)<sup>1</sup> under the European SEA Directive and transposing Regulations; and Stage2 Appropriate Assessment (AA)<sup>[2]</sup> under the European Habitats Directive and transposing Regulations. The accompanying SEA Environmental Report and AA Natura Impact Statement set out the findings of the assessments and include information on: environmental constraints and opportunities; most likely and important potential environmental impacts; most likely locations/concentrations of potential impacts; mitigation measures; and monitoring measures.

The SEA and AA team worked with the strategy preparation team at Fáilte Ireland in order to integrate requirements for environmental protection and management into the strategy. The SEA identifies that the Strategies, in combination with the wider statutory planning framework, will contribute towards the appropriate protection and management of environmental sensitivities and resources. The AA identifies that the Strategy is not expected to affect the integrity of any European site.

The SEA and AA documents provide a comprehensive description of the environmental baseline including natural heritage, ecosystem services, designated sites and protected species within and beyond the Strategy area. The findings of the SEA and AA should be read in conjunction with the Strategy

In contributing towards any outcomes under the

strategies, compliance will need to be demonstrated with, as relevant, various legislation, policies, plans and programmes (including requirements for lower-tier Appropriate Assessment, Environmental Impact Assessment and other licencing requirements as appropriate) that form the statutory decision-making and consent-granting framework, of which the strategy is not part and does not contribute towards. Such legislation, policies, plans and programmes include:

- Requirements for lower-tier environmental assessment, including EIA and AA;
- Relevant land use and other sectoral plans that form part of the statutory decision-making and consent-granting framework and that have undergone environmental assessment, as appropriate, including various provisions relating to sustainable development, environmental protection and environmental management; and
- The Climate Action Plan.

## Monitoring

A SEA Environmental Monitoring Programme for the Strategy will be executed during implementation and operation. Monitoring can demonstrate the positive effects facilitated by the strategy and can enable, at an early stage, the identification of unforeseen adverse effects and the undertaking of appropriate remedial action.

A focus of the Programme will be to: identify any specific activities that cause specific impacts; and to examine whether such impacts (if they exist) have higher prevalence at certain site types.

The occurrence of persistent significant adverse environmental effects which are directly attributable to tourism would necessitate consideration of the effects in the context of the strategy and a possible review of part(s) of the strategy.

Environmental monitoring will be based around indicators that allow quantitative measures of trends and progress over time and a variety of sources of information will be used to run the programme. Environmental monitoring will be executed by Fáilte Ireland and will run concurrent with the implementation phase of the strategy itself. It will be reported on to the strategy's

implementation group on an annual basis where relevant information sources allow, and the findings of the monitoring will influence the actions of the strategy as it progresses. The monitoring will be linked directly to the strategy KPIs, including monitoring of visitor numbers where relevant.

Environmental monitoring for the strategy and other existing/future Fáilte Ireland plans, programmes, etc. may be undertaken and reported on at the same time. This monitoring will be built on and compliment the work of Fáilte Ireland's new National Environmental Monitoring Programme 2021–2026.

With respect to infrastructural capacity (including drinking water, wastewater, waste and transport) the potential impact on existing infrastructure as well as the potential environmental effects of a likely increase in tourism-related traffic volumes along any routes resulting from the relevant initiative will be considered and mitigated as appropriate, where relevant.

Close collaboration will also be undertaken with the relevant stakeholders, such as Local Authorities and Irish Water, to ensure that any proposed tourism developments align with the capacity of the supporting critical service infrastructure.

Safeguarding of the natural environment through monitoring will also be bolstered by the requirement to consider the following guidance documents and procedures which have been and in some cases are currently being developed by Fáilte Ireland. This list will be updated over the life of the Strategy as and when guidance and procedures are developed. Further details on these can be found in the Appendices.

- Site Maintenance Guidelines;
- Environmental Management for Local Authorities and Others.
- Visitor Management Guidelines;
- Greenway Visitor Experience & Interpretation Toolkit.
- Sustainable Recreational Trail Development & Operation (to be developed).
- Environmentally Responsible Promotion – Procedure (to be developed).
- Conflict Resolution Procedure (to be developed).

## Visitor Management

In contributing towards outcomes under the Strategy, partners and stakeholders shall seek to manage any increase in visitor numbers and/or any change in visitor behaviour in order to avoid significant effects including loss of habitat and disturbance, including ensuring that new projects are a suitable distance from ecological sensitivities.

Extensive research by Fáilte Ireland has shown improved environmental outcomes (including improved attainment of conservation objectives) in areas with visitor management strategies. Visitor management strategies may be required from partners and stakeholders who are contributing towards outcomes under the Strategy, as relevant and appropriate.

Visitor management strategies will be required for proposed plans, programmes and projects that are to receive funding as relevant and appropriate.

## Green Infrastructure and Ecosystem Services

Green infrastructure can be defined as a strategically planned network of natural and semi-natural areas. In contributing towards outcomes under the Strategies, partners and stakeholders shall contribute towards the maintenance of existing green infrastructure and its ecosystem services, taking into account the output of the Mapping and Assessment of Ecosystem Services project being undertaken by the NPWS. Proposals for the development of any green infrastructure should demonstrate the synergies that can be achieved with regard to the: provision of open space amenities; sustainable management of water; protection and management of biodiversity; protection of cultural heritage; and protection of protected landscape sensitivities.

## Greenway Development

Extension of existing greenways and future development of new greenways and blueways should complement and integrate rather than replace existing green infrastructure. Stakeholders considering the development of greenways and blueways should have regard to the Fáilte Ireland publication “Greenway – Visitor Experience & Interpretation Toolkit” and “Connecting with nature for health and wellbeing” EPA Research Report 2020.



## Environmental Damage Resolution

Action-based responses are essential at site-specific level in response to instances of environmental perturbation. Although the Strategy is not envisaged as being likely to directly result in any such instances of environmental perturbation, it forms part of a hierarchy of tourism initiatives, including lower tier DEDPs, and the wider Statutory planning framework. The Environmental Damage Resolution procedure provides for a consistent approach in responding to such issues and is available for integration at DEDP and site-specific levels.

## Environmentally Responsible Tourism Promotion & Campaign Statement

Environmental considerations will be integrated into promotional processes and environmentally responsible tourism campaigns will be required. Such campaigns will garner environmental stewardship that will help to ensure environmental protection and management. Promotional processes will be informed by environmental considerations, including available capacity, at a local level.

## Site Management

Fáilte Ireland's extensive monitoring of the effects of tourism to date has shown predictors of impact occurrence to include: site type; group type; the number of activities; activity intensity; and the interaction between activity intensity and abundance. Site management must consider these factors in seeking to reduce the potential for impacts to occur and to remove impacts.

## Climate Action

Fáilte Ireland will comply with the most up to date Climate Action Plan, National Climate Change Adaptation Framework and National Mitigation Plan, including contributing towards efforts to decarbonize the tourism sector, improve low carbon travel, such as walking and cycling, and the circular economy.

Fáilte Ireland's 2023 Corporate Strategy will identify progress in relation to relevant actions as set out under the Climate Action Plan and the meeting of national and sectoral commitments relating to emission targets.

### STRATEGIC INITIATIVES.

1. Undertake a comprehensive audit of all sustainable tourism and eco-tourism businesses in the region in 2022.
2. Benchmark the destinations within the region against an internationally recognized sustainability standard and create a plan to improve their sustainability rating over the course of this strategy.
3. Promote responsible tourism practices among tourism providers and encourage them to pursue sustainability certification as appropriate. In particular, establish an eco-tourism toolkit for tourism businesses and code of practice.
4. Establish a carbon footprint benchmark for tourism in the region and a carbon reporting framework at both the level of the region and the enterprise and allow the industry to report on carbon reduction and off-setting measures (these will be provided nationally).
5. Devise a set of carbon calculators using the carbon reporting framework for tourism businesses and for tourists (these will be provided nationally).
6. Roll out a comprehensive programme of sustainability supports and toolkit (nationally) to industry and host a series of accompanying workshops.

7. Fáilte Ireland will work with a number of State Agencies, such as SEAI, and industry groups, to support the industry in reaching its carbon reduction targets as set out in the Carbon Budget and the Climate Action Plan 2021. We will also support the uptake of sustainability measurement and certification programme at both enterprise and destination levels.
8. Integrate the principles of regenerative tourism and sustainability actions into all DEDPs, including capability, particularly for communities, at the level of the destination.
9. Ensure the conservation and maintenance of key elements of biodiversity as part of any development projects to ensure they do not contribute to biodiversity losses or deterioration (i.e. there should be no net loss of biodiversity).
10. In relation to the implementation of the Shannon Tourism Masterplan and all initiatives associated with it and with any other water-based initiatives, it is our objective to ensure the prevention and management of the introduction and spread of Invasive Alien Species (IAS) with accordance with the EC (Birds and Natural Habitats) Regulations, 2011 and EU Regulation (1143/2014).
11. As part of the implementation of this strategy, we will identify opportunities to enhance or create Green Infrastructure (GI) and ecological corridors which can provide important links in the connectivity of European Natura 2000 sites and other protected sites.
12. We will ensure that all proposed land development in the RTDS incorporates positive biodiversity measures as standard practice. Actions can include simple measures, e.g. all new public buildings incorporate nesting boxes for swifts and/or bat boxes, the creation of wildlife habitats on public open spaces, to more ambitious measures that will ensure 'biodiversity net gain' on public development schemes.
13. Promote the Leave No Trace principles to both visitors and tourism providers.
14. Pursue an increase in the number of Blue Flag marinas along the Shannon and the Shannon-Erne.
15. Support the establishment of the Mid Shannon Wilderness Park.
16. In association with NPWS, Waterways Ireland and the Local Authorities, explore the potential for a UNESCO Biosphere for Lough Ree and its environs that will enhance the environmental status and create opportunities for low impact, nature-based tourism experiences.
17. In line with the Shannon Tourism Masterplan, establish bio-security standards to be used by all craft on the Shannon and establish bio-security facilities at designated entry points.
18. Undertake a series of initiatives with a range of stakeholders, such as the NPWS and Birdwatch Ireland, to raise awareness of the wealth of wildlife in Ireland's Hidden Heartlands, and to identify the best sites at which to view wildlife, in accordance with good environmental practice.
19. Support the delivery of e-charging infrastructure to support EV touring and sustainable travel.
20. Implement Fáilte Ireland's National Environmental Monitoring Programme, in which there are four monitoring sites in Ireland's Hidden Heartlands, to ensure that the effects of tourism on environmental, heritage and cultural assets is monitored to allow for early detection of any possible issues. Keep this list of sites under review and amend or add to it as required.



**21.** Support the delivery of e-charging infrastructure to support EV touring and sustainable travel.

**22.** There are several important nature conservation projects in the Hidden Heartlands region (including the Hen Harrier Project European Innovation Partnership, the Grey Partridge Project, and the White-tailed Sea Eagle Reintroduction and Active Raised Bog Restoration on Protected Sites) as well as more local conservation projects which regenerative tourism could support. Fáilte Ireland will explore, with appropriate stakeholders, how these projects can be supported over the period of this strategy.

**23.** As part of Bord na Móna's Peatlands Climate Action Scheme (PCAS), over 30,000 hectares of cutaway bog will be subject to enhanced rehabilitation. This scheme has been described as 'Europe's largest conservation project'. In the early period of this strategy, Fáilte Ireland, with other stakeholders including Bord na Móna, NPWS and the Local Authorities, will explore, how regenerative tourism could support cutaway bog rehabilitation in the region to the benefit of local communities as well as ecosystem services these rehabilitated bogs provide.



*Belvedere House, Mullingar, County Westmeath.*





# 4. MEASURING SUCCESS

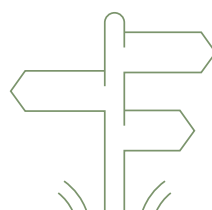


## 4.1. MEASURING SUCCESS

The following is a series of targeted outcomes that are linked to four overarching goals set out under the VICE model, each with its own KPIs (Key Performance Indicators).

VISITOR KPIs	
TO ENSURE THAT IRELAND'S HIDDEN HEARTLANDS' DESTINATIONS ARE RECOGNISED BY THE VISITOR, THAT THE BRAND IS COMPELLING TO OUR TARGET MARKET SEGMENTS AND THAT THE EXPERIENCE EXCEEDS THEIR EXPECTATIONS.	
OUTCOMES / KPIs TO 2027	DATA SOURCE; DATA FREQUENCY; REPORTING FREQUENCY
1. A year-on-year increase in the levels of awareness of the region, its destinations and signature experiences, and an increase in consideration and intent to visit among domestic and overseas visitors.	<i>Tourism Ireland's Global Travel Index; Fáilte Ireland's Behaviour and Brand Tracker (BBT).</i>
2. A year-on-year increase in the satisfaction ratings among visitors to the region.	<i>Fáilte Ireland's Destination Attitudes Survey (DAS).</i>
3. Visitors find ease of access to high quality information about what there is to see and do in the region prior to visiting.	<i>Fáilte Ireland's DAS and BBT.</i>
4. Year-on-year increase in the number of domestic and overseas visitors engaging with the Ireland's Hidden Heartlands brand on social media.	<i>Social Media surveys.</i>
5. Ireland's Hidden Heartlands has earned a strong reputation for outdoor activities and ecotourism with a top-class set of networked greenways and blueways.	<i>Tourism Ireland's GTI; Fáilte Ireland's BBT.</i>

KPIs and metrics will evolve during the life of this RTDS.





# INDUSTRY KPIs

TO DELIVER BALANCED AND SUSTAINABLE REVENUE AND QUALITY JOBS GROWTH WITH GREATER GEOGRAPHIC AND SEASONAL SPREAD.

OUTCOMES / KPIs TO 2027	DATA SOURCE; DATA FREQUENCY; REPORTING FREQUENCY
<p>1. Tourism revenue into the region has recovered to 2019 levels by 2026.</p>	<p><i>Fáilte Ireland's Survey of Overseas Travelers (SOT); Fáilte Ireland estimates of Domestic Visitor Spend.</i></p>
<p>2. Year-on-year increase in the RevPAR of hotel bednights sold in the low season.</p>	<p><i>Accommodation Occupancy Survey.</i></p>
<p>3. An upwards trend in the number of repeat visits by domestic and overseas holidaymakers.</p>	<p><i>Fáilte Ireland's BBT and SOT.</i></p>
<p>4. An increase in the extent to which the industry is working in a networked and collaborative manner across county boundaries (destination-based) and is actively cross-promoting and cross-selling, with stronger commercial capability.</p>	<p><i>Industry Network Surveys.</i></p>
<p>5. A year-on-year increase in the number of industry websites that are well optimized, selling online and have connected distribution.</p>	<p><i>Fáilte Ireland's Digital That Delivers Survey.</i></p>
<p>6. The industry's saleable experiences are achieving year-on-year increases in sales with both domestic and overseas tour operators.</p>	<p><i>Fáilte Ireland industry surveys.</i></p>

KPIs and metrics will evolve during the life of this RTDS.

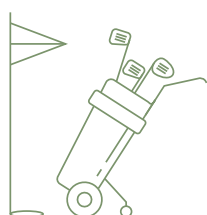


# COMMUNITY KPIs

TO ENSURE THAT IRELAND'S HIDDEN HEARTLANDS DELIVERS JOBS AND SOCIAL BENEFITS TO LOCAL COMMUNITIES IN THE MIDLANDS AND CONTRIBUTES TO A BETTER PLACE TO LIVE FOR EVERYONE.

OUTCOMES / KPIs TO 2027	DATA SOURCE; DATA FREQUENCY; REPORTING FREQUENCY
<p>1. Year-on-year increase in employment in the sector.</p>	<p><i>Fáilte Ireland data and/or CSO data.</i></p>
<p>2. Communities maintain and/or improve their Tourism Approval Rating, to demonstrate they have embraced tourism and value a visitor economy that provides diverse employment opportunities that complement their lifestyles.</p>	<p><i>Fáilte Ireland's Community Survey.</i></p>
<p>3. Growth in the value (direct and indirect) of the community tourism sector that is delivering high quality, authentic visitor experiences.</p>	<p><i>Repeat survey of community tourism sector in 2025 by IHH team.</i></p>
<p>4. Tourism has contributed to the 'Just Transition' of the region's peatlands from brown to green through the sustainable development of a network of trails.</p>	<p><i>Just Transition data.</i></p>

KPIs and metrics will evolve during the life of this RTDS.



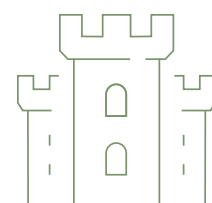
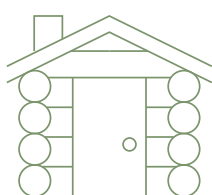


# ENVIRONMENT KPIs

TO ENSURE THAT THIS PLAN FACILITATES THE PROTECTION AND ENHANCEMENT OF THE ENVIRONMENT IN DUBLIN AS THE FUNDAMENTAL ASSET OF TOURISM IN THE REGION, IN ASSOCIATION WITH OTHER KEY STAKEHOLDERS

OUTCOMES / KPIs TO 2027	DATA SOURCE; DATA FREQUENCY; REPORTING FREQUENCY
<p>1. This Regional Tourism Development Strategy demonstrates full compliance with all relevant requirements arising from EU and Irish planning and environmental legislation.</p>	<p><i>Strategic Environmental Assessment, Appropriate Assessment &amp; National Environmental Monitoring Programme 2021-2026.</i></p>
<p>2. Tourism activities are not contributing to environmental damage, but are contributing to net gain or habitats and species.</p>	<p><i>Fáilte Ireland's National Environmental Monitoring Programme 2021-2026.</i></p>
<p>3. Tourism businesses are on track to meet their carbon reduction targets as per the Carbon Budget and in line with the Climate Action Plan 2021.</p>	<p><i>Surveys will be conducted regularly during lifetime of RTDS to monitor progress of IHH tourism businesses toward goal.</i></p>
<p>4. The region has established itself as a leading regenerative tourism destination in Europe, with an increase in the number of environmentally certified / recognized businesses by 2026.</p>	<p><i>Benchmarking report; Hidden Heartlands industry survey; Consumer Sustainability Tracker (CST).</i></p>
<p>5. Year-on-year improvement in the provision of public transport links in the region and 'last mile' transport links are in place for all key attractions together with improved e-car charging infrastructure.</p>	<p><i>Data from National Transport Authority.</i></p>
<p>6. Year-on-year increase in the uptake by industry of sustainability / environmental certification.</p>	<p><i>Certification schemes.</i></p>

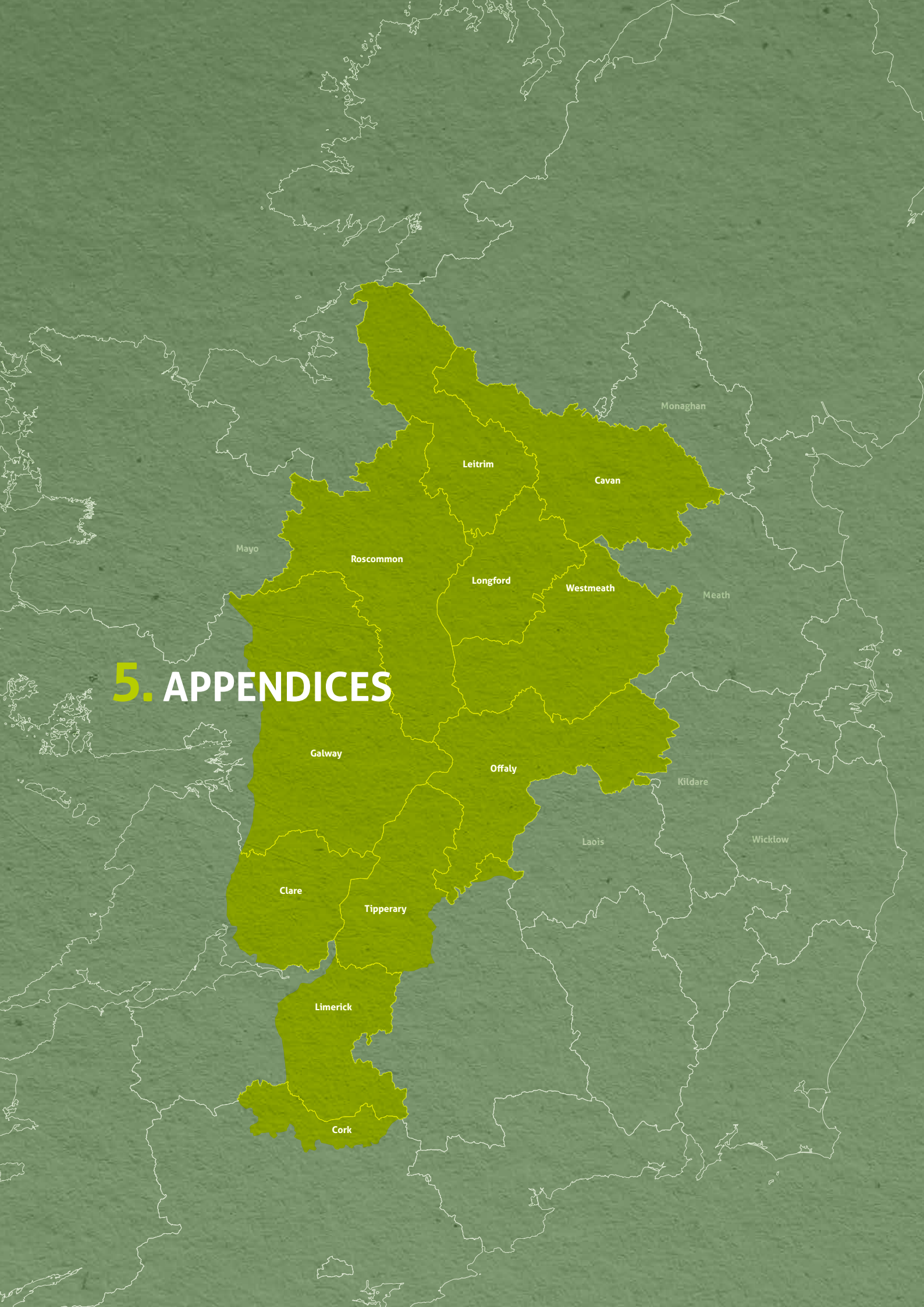
KPIs and metrics will evolve during the life of this RTDS.







# 5. APPENDICES



## 5.1. APPENDICES

### APPENDIX A1

#### RELEVANT NATIONAL AND REGIONAL POLICIES, PLANS AND STRATEGIES

PROJECT 2040 – National Planning Framework.

National Development Plan 2021 – 2030.

Climate Action Plan 2021.

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

- *Tourism Action Plan 2019 – 2021.*

- *Actions to Promote Sustainable Tourism Practices 2021 – 2023, Sustainable Tourism Working Group.*

Our Rural Future: Rural Development Policy 2021 – 2025.

Strategy for the Future Development of National and Regional Greenways, Department of Tourism, Transport and Sport (July 2018).

Blueway Management and Development Guide, Blueways Ireland.

National Physical Activity Plan for Ireland 2013 – 2025, Healthy Ireland.

Tourism Recovery Plan 2020 – 2023, Tourism Recovery Task-force.

Regional Spatial and Economic Strategy for the Southern Region (Southern Regional Assembly).

Regional and Economic Strategy 2019 – 2031 (Eastern & Midland Regional Assembly).

Regional Spatial and Economic Strategy 2020 – 2032 (Northern & Western Regional Assembly).

Dept of Business Enterprise & Innovation

- *Dublin Regional Enterprise Plan.*

- *Midlands Regional Enterprise Plan*

- *North-West Regional Enterprise Plan*

- *Mid East Regional Enterprise Plan*

- *West Regional Enterprise Plan*

- *Mid-West Regional Enterprise Plan to 2024*

OPW/NPWS

- *Heritage Ireland 2030.*

Coillte

- *Outdoor Recreation Plan 2017 – 2021.*

- *Coillte Recreation Policy 2016.*



## LOCAL AUTHORITY DEVELOPMENT PLANS AND TOURISM STRATEGIES

LOCAL AUTHORITY	DEVELOPMENT PLAN	TOURISM STRATEGY	TRANSPORT STRATEGY
<b>CLARE COUNTY COUNCIL</b>	Clare County Development Plan 2017 – 2023.	Clare Tourism Strategy 2030.	
<b>LIMERICK CITY &amp; COUNTY COUNCIL</b>	Limerick 2030 Economic & Spatial Plan. Limerick Draft County Development Plan 2022 – 2028.	Limerick Tourism Development Strategy 2019 – 2023.	Draft Limerick Shannon Metropolitan Area Transport Strategy.
<b>CORK COUNTY COUNCIL</b>	Cork 2050. Cork County Development Plan 2022 – 2028.		
<b>TIPPERARY COUNTY COUNCIL</b>	Tipperary County Development Plan 2022 – 2028.	Tipperary Tourism Development Strategy 2016 – 2021.	
<b>GALWAY COUNTY COUNCIL</b>	Draft Galway County Development Plan 2022 – 2028.		Galway Transport Strategy.
<b>ROSCOMMON COUNTY COUNCIL</b>	Roscommon County Development Plan 2021 – 2027.	Roscommon Tourism Strategy 2017 – 2022.	
<b>LEITRIM COUNTY COUNCIL</b>	Draft Leitrim County Development Plan 2023 – 2029.	Leitrim Tourism Strategy 2015 – 2021.	
<b>OFFALY COUNTY COUNCIL</b>	Offaly County Development Plan 2021 – 2027.		
<b>LONGFORD COUNTY COUNCIL</b>	Longford County Development Plan 2021 – 2027.	County Longford Tourism Statement of Strategy & Work Programme 2017 – 2022.	
<b>WESTMEATH COUNTY COUNCIL</b>	Westmeath County Development Plan 2021 – 2027.	Westmeath Tourism Strategy 2021 – 2027.	
<b>CAVAN COUNTY COUNCIL</b>	Cavan Draft Development Plan 2022 – 2028.	County Cavan Tourism Development Plan 2017 – 2022.	

**APPENDICES A2 – A8 TO THIS REGIONAL TOURISM DEVELOPMENT STRATEGY ARE CONTAINED IN A SEPARATE VOLUME AND ARE AS FOLLOWS:**

- A2:** Site Maintenance Guidelines.
- A3:** Visitor Management Guidelines.
- A4:** Environmental-Management-for-Local-Authorities-and-Others.
- A5:** Environmental Damage - Resolution Procedure.
- A6:** Greenway Toolkit.
- A7:** Responsible Promotion - Statement.
- A8:** Blueway Development and Management Guide.











