

IRELAND'S
ANCIENT EAST
REGIONAL

TOURISM DEVELOPMENT
STRATEGY 2023 – 2027



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A map of Ireland with county boundaries shown in white. The counties of Monaghan, Louth, Meath, Kildare, Wicklow, Laois, Carlow, Wexford, Tipperary, Kilkenny, Waterford, and Cork are highlighted in a solid orange color. Other counties shown in grey include Cavan, Westmeath, Offaly, Dublin, and Limerick. The text 'EXECUTIVE SUMMARY' is centered over the map in white, bold, uppercase letters.

EXECUTIVE SUMMARY

Monaghan

Cavan

Louth

Meath

Westmeath

Dublin

Offaly

Kildare

Wicklow

Laois

Carlow

Kilkenny

Wexford

Limerick

Tipperary

Waterford

Cork

EXECUTIVE SUMMARY

The Ireland's Ancient East Regional Tourism Development Strategy 2023 – 2027 is a roadmap for the tourism industry and all stakeholders involved in the region to navigate the current challenges and steer a course towards recovery and future success.

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 navigating high inflation and an energy crisis resulting in further volatility.

This Regional Tourism Development Strategy 2023 – 2027 is primarily informed by the Government's Tourism Strategy **People, Place and Policy: Growing Tourism to 2025**, the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media **Statement of Strategy 2021-2023** and Fáilte Ireland's **Strategy to 2023 – From Survival to Recovery**. It sets out a strategic approach to unlock the commercial potential of Ireland's Ancient East while ensuring development is sustainable and the benefits accrue to local communities and protect our natural environment. The Strategy is also informed by planning policy, the National Planning Framework, the Regional Spatial and Economic Strategies and lower tier plans.

THE CONTEXT

Ireland's Ancient East was launched in 2015 as a mechanism to unify the region as an internationally marketable tourism destination. By 2019, tourism in Ireland's Ancient East was worth €1.7bn to the regional economy supporting approximately 55,200 jobs. Over half (55%) of this revenue was generated by international visitors with the remaining 45% from Island of Ireland visitors.

At a consumer level, the brand has proven to be a motivating reason to visit Ireland with 650,000 more visitors visiting the region in 2019 compared to 2017. Nationally, Ireland's Ancient East has a 25% share of overseas visitors to Ireland and 35% share of total domestic trips. In the international marketplace, the brand has proven to be very appealing to the Great Britain, German, French and North American markets. Ireland's Ancient East is a brand in its infancy with plenty of opportunity for further economic growth.

The intention of the brand is to provide our visitors with a very different flavour of Ireland relative to Ireland's other regional experience brands.

In building on the early success of Ireland's Ancient East, the continued focus is to increase the economic contribution of tourism to the region by convincing visitors to stay longer and explore more of what the region has to offer. At an industry level we will increase the level of brand adoption and collectively grow market awareness of Ireland's Ancient East domestically and internationally.

OUR AMBITION

Our ambition for this strategy is to drive recovery and growth of the visitor economy in Ireland's Ancient East to create sustainable, high-quality jobs in the sector to 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 goal.

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, given ongoing disruption to the global supply chain, at a minimum we expect a return to 2019 levels of revenue by 2026, in inflation adjusted terms and with an ambition to exceed this.

We expect an additional 5% supply side capacity (accommodation, visitor attractions, activity providers, etc.) to come on stream over the period of this strategy. This will 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 Ireland's Ancient East, this means growing tourism revenue at a faster rate relative to the established tourism hotspots nationally 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 Ancient East is not only internationally renowned for its **rich heritage base** but also the variety of tracks and trails by which the region can be discovered. Its diverse landscape provides the visitor with a rich tapestry from which to unlock the **living culture unique to place** and underpinned by 5,000 years of heritage and tradition evidenced in its many historical sites.

As the **food producing region** of Ireland, the provenance and offering is steeped in the same tradition as its music, crafts and culture and is alive for all the senses. The region boasts extensive coastline, river and canal networks, mountain ranges and low-lying rich pastures accessible by an **extensive off-road network of greenways, tracks and trails** by which the visitor is invited to discover the heritage that shaped Ireland.

Interspersed with **cities and towns** that provide evening and night-time entertainment, it is the diversity that has developed over time which attracts the visitor for a varied holiday.

THE CHALLENGE

The strategic challenge for Ireland's Ancient East is to increase awareness and consumer appeal of the region through a strengthened brand proposition; improve the 'navigability' of the region for the visitor and ensure the continued development of attractive destinations and motivating visitor experiences, in a coordinated and visitor facing manner to attract and disperse targeted domestic and overseas visitors.

STRATEGIC APPROACH

The Ireland's Ancient East Regional Tourism Development Strategy will achieve a new vision for tourism in the region through the following strategic objectives:

STRATEGIC OBJECTIVE 1: Motivate the domestic and international consumer to visit Ireland's Ancient East.

STRATEGIC OBJECTIVE 2: Provide the visitor with more reasons to stay, increasing the economic impact of tourism.

STRATEGIC OBJECTIVE 3: Ensure the region is easy to access, navigate and consume for the visitor.

STRATEGIC OBJECTIVE 4: Enable and assist the industry to grow its capacity and capability to ensure it can thrive over the period of this strategy and create sustainable jobs in local communities.

STRATEGIC OBJECTIVE 5: Build committed stakeholder and industry partnerships to guide sustainable destination development across 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 for Sustainable Tourism. The VICE model 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. Sustainability in tourism demands rethinking tourism success and mainstreaming sustainable tourism policies and practices.

Decarbonising 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 and under Ireland's 2021 *Climate Action Plan*. Fáilte Ireland will adhere to these plans during the lifetime of this strategy.

VISITOR STRATEGY

Our visitor strategy will be guided by a new Domestic Motivations Framework through an understanding of consumer motivations for travel through continuous visitor research. This will provide new opportunities for targeted marketing and promotion of Ireland's Ancient East to grow awareness of what there is to do and see in the region both domestically and to attract more international visitors from our key source markets of continental Europe, North America and the UK.

The strategic intent is for Ireland's Ancient East to grow penetration and improve dispersion of visitors (over 50% of repeat visitors currently return to the same destination) looking for longer stays in a region that provides the complete holiday offering. From a leisure perspective the differentiated product base that the region boasts will enable key motivations for travel to be specifically targeted. Families will be a key focus for longer breaks while the continuous development of new experiences

and attractive cities and towns across the region will also provide opportunities in the younger and older unconstrained adult markets.

The review of the Ireland's Ancient East brand will ensure the brand reflects the existing and emerging range of experiences available throughout the region, improve resonance within the domestic market and increase stakeholder adoption.

We will increase our focus on growing the number of luxury visitors to Ireland's Ancient East through the development of targeted experiences, and continue to work with business tourism focused industry as well as the Cork Convention Bureau to increase the share of high yielding Meetings, Incentive, Conferences and Events (MICE) visitors to Ireland's Ancient East.

DESTINATION DEVELOPMENT

Over the course of this strategy, in addition to three Destination and Experience Development Plans (DEDPs) that already exist, eight DEDPs will be prepared for destinations within the region:

| | |
|----|--|
| 1 | Meath & Louth – Ancient <i>Launched in 2021</i> |
| 2 | Kildare and Tipperary – Thoroughbred Country <i>Launched in 2021</i> |
| 3 | Monaghan <i>Launched in 2022</i> |
| 4 | Cork City, Harbour and East Cork <i>Launching 2023</i> |
| 5 | South Tipperary <i>Launching 2023</i> |
| 6 | Waterford <i>Launching 2023</i> |
| 7 | Wexford <i>Launching 2023</i> |
| 8 | Kilkenny <i>Launching 2023</i> |
| 9 | Wicklow <i>Commence in 2023</i> |
| 10 | Laois <i>Commence in 2023</i> |
| 11 | Carlow <i>Commence in 2023</i> |

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. DEDPs will also be subject to environmental assessment as relevant.

This approach will ensure every part of Ireland's Ancient East will have an appropriate development plan in operation within the lifetime of this strategy.

PRODUCT DEVELOPMENT

Product throughout the region will need a continuous refresh to ensure the tourism product itself meets the changing demands of the visitor in a competitive international marketplace. The approach to tourism product development across Ireland's Ancient East will also be guided by the destination development needs and the maturity of the various destinations.

This will result in the development and enhancement of product in partnership with Local Authorities, government departments, private sector and other stakeholders. The complementary suite of iconic, signature, core and supporting attractions and the balance of each to contribute to makeup of successful destinations will be scoped out through the development of DEDPs relative to their stage of maturity in order to achieve the strategic objectives set out above.

The focus will be to sustainably build out the range and quality of visitor experiences, based on the region's natural and cultural assets in partnership with our key stakeholders. Ensuring that our heritage product throughout the region meets visitor expectations is fundamental to the success of the region overall given its importance to the offering. As well as the ongoing development of individual attractions one of the strategic objectives set out in this strategy is to improve the 'navigability' of the region from a visitor perspective.

We will therefore focus on the development of a connected network of visitor facing trails, including walking, cycling, on road and on-water routes to help the visitor consume the region and its rich product base.

We will also seek to influence the development of key towns as attractors in themselves, maximizing government and private investment through URDF, RRDF, Town and Village Renewal, Active Travel and other schemes with strong accommodation bases to retain the visitors for longer. The three cities in the region, Cork, Waterford and Kilkenny have all received significant state development investment to meet projected population growth, we will seek to ensure that the visitor needs are addressed in these large-scale investments to ensure the cities are attractors in themselves.

COLLABORATION

The key to the success of this strategy will be the strength of collaboration between all partners including the tourism industry, Local Authorities, state agencies, private enterprise and community groups.

The strategy will require close collaboration with the Ireland's Hidden Heartlands, Dublin and the Wild Atlantic Way regions. This will result in the development and promotion of new touring routes and itineraries to encourage new visitor flows and open up opportunities for less-visited destinations.

Cross border collaboration is also necessary to unlock the potential of the Dublin – Belfast corridor for the region with such a rich product base between the two ideally placed for the visitor. Developing cross border destinations such as Cooley Mourne and Gullion, and North Monaghan, Armagh and Tyrone will improve the visitor offering and encourage more dwell time in these destinations.

Over the course of this Regional Tourism Development Strategy, Fáilte Ireland will work closely with its partners to ensure the Ireland's Ancient East brand promise is delivered to a high standard across all touchpoints in the visitor journey.

INDUSTRY CAPACITY AND 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 certain parts of the region are still at an early stage of maturity as tourism destinations, there will be a particular and sustained focus over the period of this strategy on the development of commercially focused business networks and clusters across the region.

Building on the success of the Ireland's Ancient East Digital Distribution Pilot in 2021, 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** to address the market failure that currently exists in booking experiences online.

Sales and Distribution Plans will be prepared for each DEDP in Ireland's Ancient East based on the maturity level of each destination. The focus of the Distribution Plans will be to build on existing success with the domestic and key overseas markets. Support will be provided to businesses to help shape their products for different distribution channels and build their sales and contracting skills.

The significant challenges faced by tourism businesses over the next five year to reduce their CO² 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.

COMMUNITY

Tourism and hospitality employs an estimated 55,200 people in Ireland's Ancient East and nationally accounts for 1 out of every 9 jobs in Ireland. Tourism reaches into nearly every community in Ireland like no other industry. It forms a vital part of the overall economy in communities throughout the region and local communities are at the heart of any successful visitor destination. The landscape, people and communities, together with their culture and heritage represent the assets of Ireland's Ancient East. This strategy will ensure tourism continues to benefit local communities in the region.

We will work with local communities through dedicated community tourism initiatives and provide the platforms for them to engage in tourism development through DEDP clusters. The opportunities provided by trail and route development will provide the platform for new community enterprises and sustainable jobs.

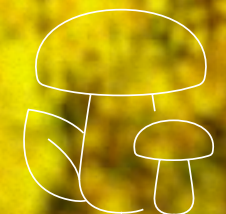
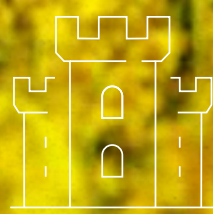
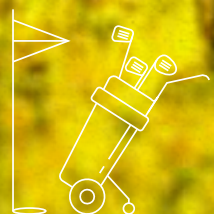
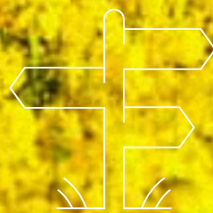
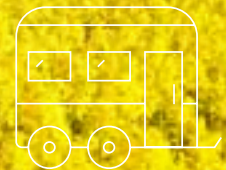
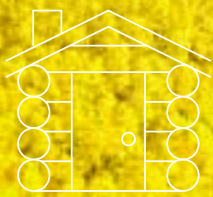
ENVIRONMENTAL PROTECTION & PROMOTION

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.

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 shown in white. A large area in the eastern and southern parts of the island is highlighted in a solid orange color. This highlighted area includes the counties of Monaghan, Louth, Meath, Westmeath, Kildare, Wicklow, Laois, Carlow, Wexford, Tipperary, Kilkenny, Waterford, and Cork. The counties of Cavan, Offaly, Limerick, and Dublin are not highlighted. The text '1. INTRODUCTION AND CONTEXT - ABOUT THIS STRATEGY' is overlaid on the map in white, with the number '1' in yellow.

1. INTRODUCTION AND CONTEXT - ABOUT THIS STRATEGY

Monaghan

Cavan

Louth

Westmeath

Meath

Dublin

Offaly

Kildare

Wicklow

Laois

Carlow

Kilkenny

Wexford

Limerick

Tipperary

Waterford

Cork

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 Ancient East, together with a 5-year strategy to guide the activation and delivery of our vision. It identifies the elements required at a strategic level to unlock the commercial potential of the region while exceeding the expectations of our visitors and protecting the environment.

The strategy is intended to be the blueprint for sustainable tourism development in the region under which a range of 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 plan will also help identify priorities for available funding in the region, e.g. URDF, RRDF, ORIS, Just Transition etc.

The regional strategy adopts a new approach to destination-led development based on a destination maturity model recognising the issues and challenges facing a destination are directly linked to its level of maturity. This ensures the correct type of interventions and supports for the destination are activated and future development is sustainable and successful for the destination.

Developing destinations is complex and multi-faceted. It involves a myriad of different stakeholders with a wide range of touchpoints that impact on the quality of the visitor experience. Among the many elements that constitute a great destination include the core motivators from visitor attractions, activities, the accommodation base to visitor facilities and services.

The destination experience is further enhanced by the quality of its physical and digital infrastructure. Accessibility, public realm, landscape and how we present our towns and villages are central to achieving the level of visitor satisfaction we are collectively pursuing, fundamentally they must be great places to live and work first.

It is the combination of these building blocks that shapes the overall destination offering. A strong partnership approach among all stakeholders centred around a clear vision is key to creating strong sustainable destinations. This works when Local Authorities, community groups, industry groups and State agencies come together around a shared vision and a willingness to work collectively to sustainably develop a destination that works for visitors and locals alike.

As part of the regional strategy consultation process, Fáilte Ireland consulted widely with industry and stakeholders and undertook a survey of all tourism industry across the Ireland's Ancient East region to understand their strategic development priorities for the region. We have also consulted with our key Local Authorities and state agency partners.

Fáilte Ireland has also taken into account the findings of the Strategic Environmental Assessment (SEA) which are detailed in the accompanying SEA Environmental Report. The inputs of our tourism industry partners and wider stakeholders are reflected in the formulation of this Regional Tourism Development Strategy, and has provided for the strategic direction for Ireland's Ancient East.

DISTINCTIVE DESTINATIONS



Source: Fáilte Ireland.

1.2. IRELAND'S ANCIENT EAST AND SUCCESS TO DATE

Ireland's Ancient East was launched in 2015 as a mechanism to unify the region as an internationally marketable tourism destination. It also serves as a mechanism to show potential visitors the breadth of experiences available throughout the region and disrupt traditional visitor flow and dispersal.

It also was intended to offer the visitor a very different flavour of Ireland relative to Ireland's other regional experience brands and has delivered well in this regard. The brand seeks to increase the economic contribution of tourism by convincing visitors to stay longer and experience more of what the region has to offer.

Internationally, the brand has proven itself to be particularly compelling in the Great Britain, German, French and North American markets.

At a consumer level, the brand has proven to be a motivating reason to visit Ireland with 650,000 more visitors visiting the region in 2019 compared to 2017. International consumer testing has shown the brand to be motivating to visit Ireland.

Ireland's Ancient East is a brand in its infancy with an opportunity for growth in adoption by industry and awareness in domestic and international markets.

VALUE AND SHARE OF TOURISM

€1.7bn

VALUE OF TOURISM IN IRELAND'S ANCIENT EAST REGION

55,200

TOURISM JOBS SUPPORTED

55%

PERCENTAGE OF REVENUE GENERATED BY INTERNATIONAL VISITORS

25%

SHARE OF TOTAL OVERSEAS TOURISTS TO IRELAND

45%

PERCENTAGE OF REVENUE GENERATED BY ISLAND OF IRELAND VISITORS

35%

SHARE OF TOTAL DOMESTIC TRIPS IN IRELAND



Monaghan

Cavan

Louth

Meath

Westmeath

Dublin

Offaly

Kildare

Wicklow

Laois

Carlow

Tipperary

Kilkenny

Wexford

Waterford

Cork

Limerick

1.3. STRATEGIC CONTEXT

The *Ireland's Ancient East Regional Tourism Development Strategy 2023 - 2027* is a roadmap for the industry and all stakeholders involved in tourism in the region to navigate the current challenges and steer a course towards recovery and continued success.

This Strategy 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*, the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media *Statement of Strategy 2021-2023*, Fáilte Ireland's *Strategy to 2023 - From Survival to Recovery* 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). 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 impact 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 *Strategy to 2023 - From Survival to Recovery*. The Ireland's Ancient East Regional Tourism Development Strategy 2023 - 2027 will review and respond appropriately to these policies and strategies on an ongoing basis.

Fáilte Ireland's Strategy to 2023 - From Survival to Recovery 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. | <i>SURVIVE TO THRIVE.</i> |
| 2 | To support industry to attract and retain talent to support sustainable growth. | <i>SUPPORTING TOURISM CAREERS.</i> |
| 3 | To achieve a sustained step change in Irish stay-cations. | <i>ACCELERATE DOMESTIC TOURISM.</i> |
| 4 | To transform Ireland's outdoor tourism experience. | <i>OPENING THE OUTDOORS.</i> |
| 5 | To transform Irish tourism's online presence and e-commerce capability. | <i>DIGITAL THAT DELIVERS.</i> |
| 6 | To enhance the destination experience and support the industry in building a pipeline of future international business. | <i>DESTINATION DEVELOPMENT AND DISTRIBUTION.</i> |
| 7 | To reduce the carbon footprint of the tourism sector and make it much more sustainable. | <i>DRIVING CLIMATE ACTION.</i> |
| 8 | To ensure our delivery is best in class. | <i>DELIVERING EXCELLENCE.</i> |

The strategy that follows for Ireland's Ancient East 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 Ancient East using the best available data to hand, we will ensure that 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 permitted, the main growth for Ireland's Ancient East over the next five years is expected to come from the overseas market. There is a risk that the domestic market may experience a dip in 2022 and 2023 due to international travel re-opening and Irish people taking the opportunity to travel overseas. However, over the medium term we believe that domestic trips will reach a new peak.

Given the improvements in remote working technology, certain areas such as Cork City, which have benefited from multinational corporate travel in the past will need to diversify their market segments to a mix of leisure and business tourism as corporate travel is unlikely to resume to the same level.

Given Ireland's high reliance on overseas tourists for earning revenue, 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 but it 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 in greater numbers.

OUR AMBITION

Our ambition for this strategy is to drive recovery and growth of the visitor economy in Ireland's Ancient East creating sustainable, high-quality jobs that will support and strengthen local communities while protecting our natural and cultural environment.

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 Ireland's Ancient East, this means growing tourism revenue at a faster rate relative to the established tourism hotspots nationally, 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, 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.

Our approach is to ensure we align our development focus on future tourism and visitor trends and continuous assessment of visitor sentiment across the international and domestic marketplace.

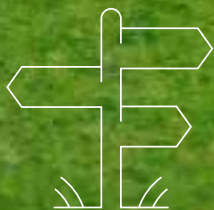
FUTURE TRENDS

Our strategic approach to recovery and destination development across Ireland's Ancient East is designed to ensure we align our development focus on global tourism and visitor 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 can build on the emerging opportunities Ireland's Ancient East is well positioned to capitalise on.



Source: Repucon Consulting.



A map of Ireland with the eastern region highlighted in orange. The highlighted area includes the counties of Monaghan, Cavan, Louth, Westmeath, Meath, Offaly, Kildare, Wicklow, Laois, Carlow, Tipperary, Kilkenny, Wexford, Limerick, Waterford, and Cork. The text '2. IRELAND'S ANCIENT EAST – VISION FOR THE FUTURE' is overlaid on the map in white and yellow.

2. IRELAND'S ANCIENT EAST – VISION FOR THE FUTURE

Monaghan

Cavan

Louth

Westmeath

Meath

Dublin

Offaly

Kildare

Wicklow

Laois

Carlow

Kilkenny

Wexford

Limerick

Tipperary

Waterford

Cork

2.1. OUR VISION FOR IRELAND'S ANCIENT EAST

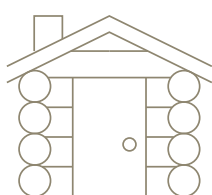
It's 2032 and Ireland's Ancient East is not only internationally renowned for its **rich heritage base** but also the variety of tracks and trails by which the region can be discovered. Its diverse landscape provides the visitor with a rich tapestry from which to unlock the **living culture unique to place** and underpinned by 5,000 years of heritage and tradition evidenced in its many historical sites.

As the **food producing region** of Ireland, the provenance and offering is steeped in the same tradition as its music, crafts and culture and is alive for all the senses. The region boasts extensive coastline, river and canal networks, mountain ranges and low-lying rich pastures accessible by an **extensive off-road network of greenways, tracks and trails** by which the visitor is invited to discover the heritage that shaped Ireland.

Interspersed with **cities and towns** that provide evening and night-time entertainment, it is the diversity that has developed over time which attracts the visitor for a varied holiday.

2.2. OUR STRATEGIC CHALLENGE

The strategic challenge for Ireland's Ancient East is to increase **awareness** and **consumer appeal** of the region through a **strengthened brand proposition**; improve the **'navigability'** of the region for the visitor and ensure the **continued development** of attractive destinations and **motivating visitor experiences**, in a coordinated and visitor facing manner to **attract** and **disperse** targeted domestic and overseas visitors.



2.3. OUR STRATEGIC OBJECTIVES

1

MOTIVATING VISITORS

Motivate the domestic and international consumer to visit Ireland's Ancient East.

2

REASONS TO STAY

Provide the visitor with more reasons to stay, increasing the economic impact of tourism.

3

EASY TO ACCESS, NAVIGATE AND CONSUME

Ensure the region is easy to access, navigate and consume.

4

GROW CAPACITY AND CAPABILITY

Enable and assist the industry to grow its capacity and capability to ensure that it can thrive over the period of this strategy and create sustainable jobs in local communities.

5

INDUSTRY AND STAKEHOLDER PARTNERSHIPS

Build committed stakeholder and industry partnerships to guide sustainable destination development across the region.

2.4. ACHIEVING OUR VISION FOR IRELAND'S ANCIENT EAST

| | |
|--|--|
| <p>1.</p> <p>STRATEGIC OBJECTIVE:</p> <p>MOTIVATE THE DOMESTIC AND INTERNATIONAL CONSUMER TO VISIT IRELAND'S ANCIENT EAST.</p> | <p>Review the current brand proposition to simplify and dial up living culture and outdoor elements, to give expression to a more rounded regional experience without losing its point of comparative advantage.</p> |
| | <p>Consolidate the geography to make it more credible in the eyes of the domestic consumer.</p> |
| | <p>Work with stakeholders to develop more truly distinctive destinations to act as attractors, disrupt the traditional visitor flow and drive the overnight stay, by developing "full destination" offering.</p> |
| | <p>Differentiate approach to day trippers versus overnights; and visiting friends and relatives versus holiday makers.</p> |
| | <p>Support the development of iconic attractions as motivators to the region.</p> |
| <p>2.</p> <p>STRATEGIC OBJECTIVE:</p> <p>PROVIDE THE VISITOR WITH MORE REASONS TO STAY, INCREASING THE ECONOMIC IMPACT OF TOURISM.</p> | <p>Support the development of new and existing visitor experiences to have a greater impact on the local economy than is currently being realised.</p> |
| | <p>Develop and harness the outdoor as a mechanism by which the region is to be discovered by the visitor.</p> |
| | <p>Develop and grow Meetings Incentives Conferences & Events through collaboration with Cork Convention Bureau and business tourism focussed industry throughout the region.</p> |

3.

STRATEGIC OBJECTIVE:

ENSURE REGION IS EASY TO ACCESS, NAVIGATE AND CONSUME.

Work with Local Authorities to develop a connected network of greenways throughout the region as defined visitor routes, including connecting Cork to Dublin.

Work with stakeholders to improve the network of visitor trails and routes as easily consumable motivators to disperse visitors throughout the region.

Influence for improved public transport and the integration of timetables within and between counties.

Collaborate with Local Link and the NTA in addressing linkages between airports, seaports, cities/towns and visitor attractions.

Work with the air and sea ports to maximise the economic impact of visitors within the region.

4.

STRATEGIC OBJECTIVE:

ENABLE AND ASSIST THE INDUSTRY TO GROW ITS CAPACITY AND CAPABILITY TO ENSURE THAT IT CAN THRIVE OVER THE PERIOD OF THIS STRATEGY AND CREATE SUSTAINABLE JOBS IN LOCAL COMMUNITIES.

Provide appropriate supports and interventions to enable businesses to thrive.

Improve the trading capabilities, digital distribution, and conversion across the industry.

Enable all tourism sectors and stakeholders to see economic value in the brand thereby increasing adoption.

Work with a number of other State Agencies, such as SEAI, and industry groups to support the industry in reaching its carbon reduction targets. Also support the uptake of sustainability measurement and certification programmes at both enterprise and destination levels.

5.

STRATEGIC OBJECTIVE:

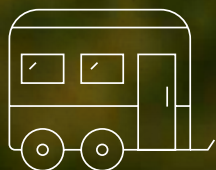
BUILD COMMITTED STAKEHOLDER AND INDUSTRY PARTNERSHIPS TO GUIDE SUSTAINABLE DESTINATION DEVELOPMENT ACROSS THE REGION.

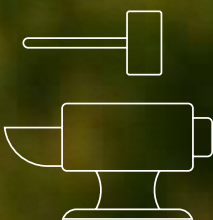
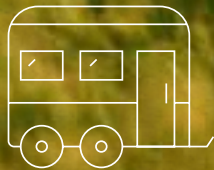
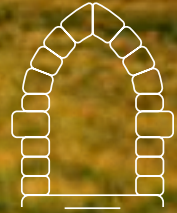
Implement Destination and Experience Development Plans to which all stakeholders are aligned relative to the lifecycle of each destination's tourism economy and maturity across the region.

Build strong tourism networks across a wide range of authorities, agencies and businesses in each destination fostering collaboration and cross promotion to shape its future.

Involve local communities in decisions about tourism that affect their areas and address any concerns that they have about tourism to achieve a proper balancing of the local community, the environment and the visitor.

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





Ardmore Watch Tower, County Waterford.

3. IRELAND'S ANCIENT EAST – STRATEGIC FRAMEWORK



3.1. STRATEGIC FRAMEWORK 2023 - 2027

The strategic framework has been developed to achieve the vision for Ireland's Ancient East 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**).

The framework outlines how we will enable and assist the industry grow its capacity and capability and deliver on this strategy (**Industry Development Strategy**). The manner in how 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**) represents further strands guiding our strategic approach.

We will ensure we build capacity within local communities and ensure that they benefit directly from tourism and that tourism works to enhance their lives (**Community Strategy**) while ensuring we protect the environment and avoid any negative impacts on it (**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 outlined in Section 2.3.

To ensure that the strategy reflects our sustainable tourism goals, the plan delivery framework adopts the VICE model to guide the plan implementation.

SUSTAINABLE TOURISM MO

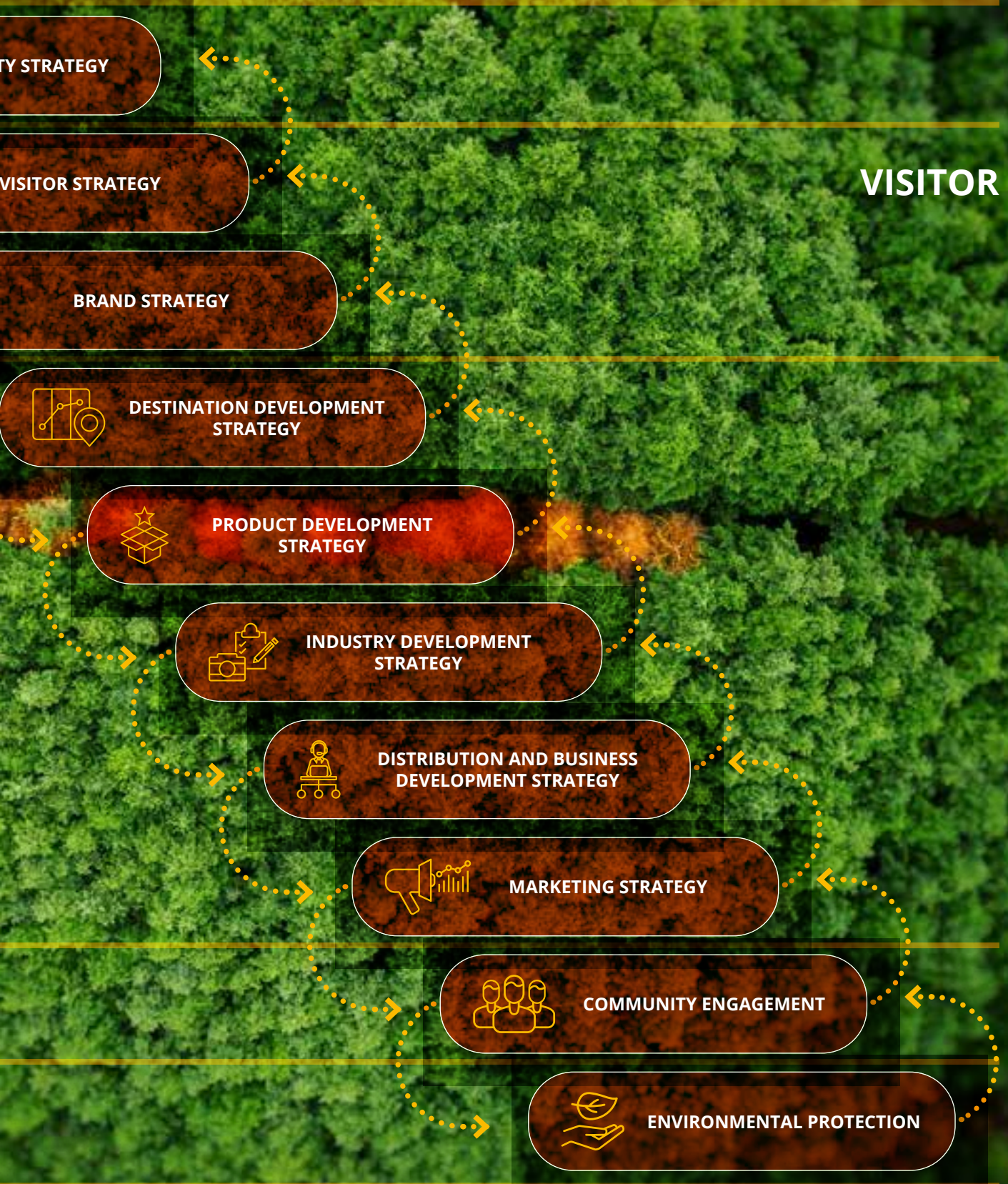


INDUSTRY

COMMUNITY

ENVIRONMENT

DEL



3.2. SUSTAINABILITY, CLIMATE ACTION AND BIODIVERSITY



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 national and sectoral commitments relating to emission targets.

For over ten years, Fáilte Ireland has employed the internationally recognised VICE approach which 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" and 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 recommendations of the Sustainable Tourism Working Group (STWG). The recommendations (www.gov.ie/en/publication/c0cd3-sustainable-tourism-working-group-report) which are contained in a report published in 2021 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 and calls out the key role of the tourism sector in helping to deliver Ireland's commitments under the **Paris Agreement** on Climate Change contained in **Ireland's Climate Action and Low Carbon Development Act 2021**.

The actions contained in the Sustainable Tourism Working Group report directly influence all workflows across the organisation and captured under each of the strategic pillars of Fáilte Ireland's **Strategy to 2023 – From Survival to Recovery**, but in particular under the Driving Climate Action strategic pillar, which includes the following key activities

- **Driving Change through Knowledge and Metrics** where Fáilte Ireland's Research team is working to establish a benchmarkable CO2 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 conjunctions with Local Authorities and other partners, will work with destinations in the region to benchmark their sustainability performance and take steps to progress them on their sustainability journey over the course of each DEDP, including improved access to public transport options. And where our Commercial Development team works 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 those 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. 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 Fáilte Ireland's embrace of an integrated and collaborative effort across the tourism sector to drive a broad ambition, called out in the STWG report, that Ireland will seek to be amongst the world-leaders in sustainable tourism practice.

Our ambition and practical support to improve the sustainability of tourism is evident at the regional and destination levels. From integrating sustainability goals into Destination and Experience

Development Plans (DEDPs) in collaboration with local stakeholders, to providing practical tools for the tourism sector to measure and reduce its carbon footprint, and more recently seeking to support recruitment and retention of jobs in the tourism sector, Fáilte Ireland's 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 – through engaging the visitor fully in the life of the communities, environment, and heritage as the core of Ireland's tourism offering, Fáilte Ireland aims not just to work with our partners to sustain the tourism sector but also to support a regenerative approach to its development. The COVID19 global pandemic has accelerated the level of visitor consciousness of their role in sustainability and responsible tourism. Sustainable destination development 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 our regional brands is not just about what we do, but going forward it will become part of the story we tell and determine how our brand and its associated stories resonate with domestic and international visitors.

In addition to decarbonising the tourism sector, the most important sustainability challenge for Ireland's Ancient East will be to make decisions around tourism that benefit our communities and our natural and historic environment in a balanced manner, ensuring that tourism activities do not negatively impact sensitive environments.

Tourism must work to create flourishing places and thriving communities. In growing tourism revenue, we must ensure that we protect the quality, character and distinctiveness of environmental and heritage assets and guarantee that there are no negative impacts on local communities. Furthermore, 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 Tourism Ireland's 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 the Ireland's Ancient East

The strategic intent is for Ireland's Ancient East to grow penetration and improve dispersion of visitors (over 50% of repeat visitors currently return to the same destination) looking for longer stays in a region that provides the complete holiday offering. From a leisure perspective, the differentiated product base that the region boasts will enable key motivations for travel to be specifically targeted.

Families will be a key focus for longer breaks while the continuous development of new experiences and attractive cities and towns across the region will also provide opportunities in the younger and older unconstrained adult markets.

UNDERSTANDING OUR VISITORS

INTERNATIONAL VISITORS

WHAT TYPICALLY MOTIVATES VISITORS FROM OUR KEY INTERNATIONAL MARKETS

Great Britain

The British market mirrors much of the behaviour of the Irish domestic market in their attraction to bundled holiday type experiences with lots to see and do to (that's different to home). British people want to experience a different culture that they can't get at home.

Easy walking is their favoured way to sightsee, in both urban and rural settings. Easy activity on or near water perform well (but not in water i.e., watersports), coastal walks, boat trips, National Parks, mountain walks near urban centres etc.

Germany

Ireland's dramatic coastal scenery is a unique selling point (USP) to the German market. 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.

North America

North American holidaymakers like lots of variety in their holiday itinerary and prefer 'bite sized' experiences so they can explore a wide range of experiences. Iconic historic attractions differentiate Ireland and are an important driver of travel for the USA market. Activity is generally of an easy nature as they explore and engage with landscape and historical sites.

INTERNATIONAL VISITORS

€365

AVERAGE SPEND PER VISITOR TO IRELAND'S ANCIENT EAST

40%

OF TOURISTS TO IRELAND'S ANCIENT EAST ARE OVERSEAS RESIDENTS, MAINLY COMING FROM BRITAIN AND MAINLAND EUROPE

68%

OF INTERNATIONAL VISITORS TYPICALLY VISIT THE REGION BETWEEN JUNE AND SEPTEMBER

56%

OF THE REGION'S TOURISTS ARE ON HOLIDAY CONTRIBUTING TO AN AVERAGE STAY OF 5.6 NIGHTS

67%

PERCENTAGE OF IRELAND'S ANCIENT EAST VISITORS WHO SPENT AT LEAST ONE NIGHT ON THE WILD ATLANTIC WAY

62%

PERCENTAGE OF NIGHTS SPENT BY VISITORS IN PAID SERVICES ACCOMMODATION

76%

PERCENTAGE OF IRELAND'S ANCIENT EAST VISITORS WHO SPENT AT LEAST ONE NIGHT IN DUBLIN

55%

OF VISITORS ARE AGED OVER 45 YEARS, TRAVEL EITHER IN COUPLES OR FAMILY GROUPS AND ARE MORE LIKELY TO USE A CAR (68%)

DOMESTIC VISITORS

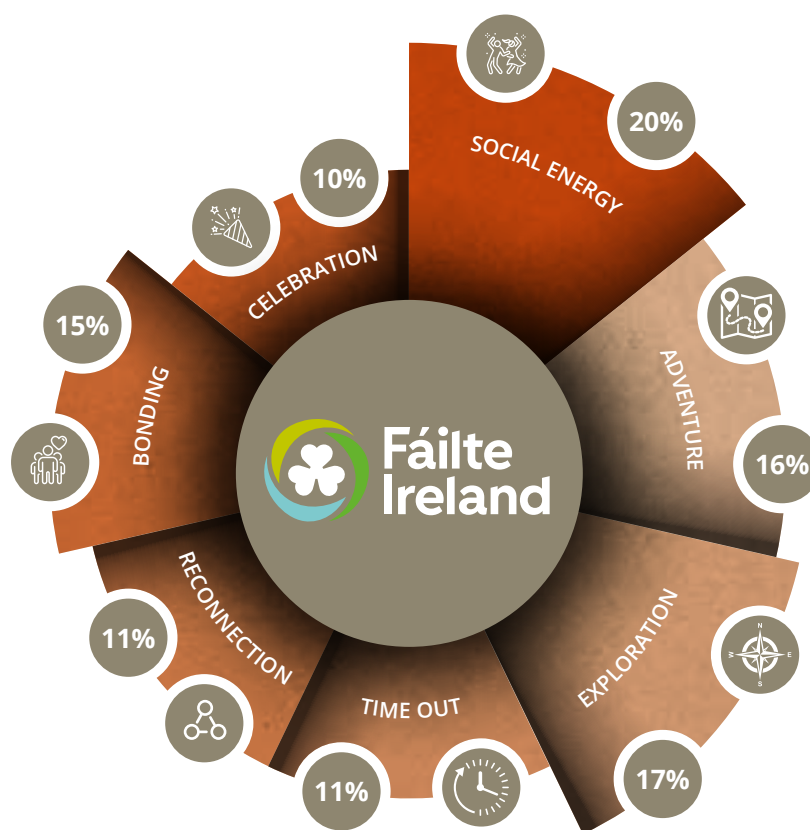
MOTIVATING OUR DOMESTIC VISITORS

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 34% and a high intent of 43% (intent to travel to Ireland's Ancient East). Of those who had visited the region, 25% were first time visitors to the region with 75% being repeat visitors, the majority of whom stayed in the same location as on their previous trip.

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 closes to me.
- **Bonding:** to nurture the relationships with my family and those closet to me.
- **Celebration:** to celebrate a special occasion.



Source: Fáilte Ireland.

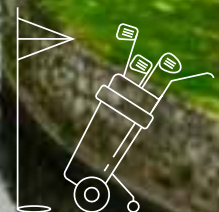
In comparison with other regions, Ireland's Ancient East does not over index (or stand out) on any of the travel motivations – in essence it delivers on all of them. Bonding (family), Exploration, Social Energy and Adventure pull out as being slightly more important drivers, although this is not significant.

At the same time, when it comes to drivers of location, or, where visitors are going in the region, Ireland's Ancient East significantly over indexes on convenience and locations that have activities aimed at children. In the Bonding motivation, children's needs will always override all other decision criteria and the requirement to have product and options that are child friendly in the region is critical.

Given that multiple motivations are present, alongside the habitual nature of locations visited, the opportunity to drive awareness of what is on offer and get visitors to explore more of Ireland's Ancient East through the various strategies is clear.

Visitors predominantly stay in hotels, although Camping, Camper Van and Motor Homes over index versus other regions.

DOMESTIC VISITORS



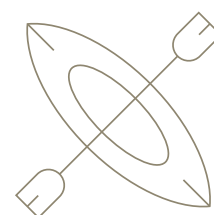
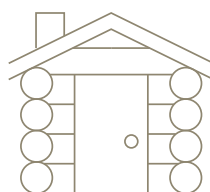
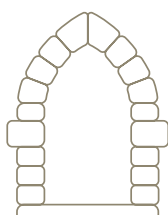
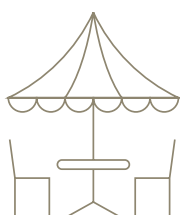
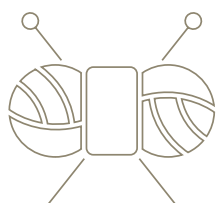
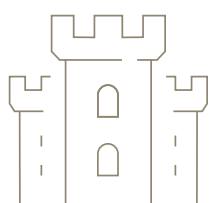
River Barrow, County Carlow.

STRATEGIC FOCUS FOR OUR VISITOR STRATEGY – ADDRESSING OUR STRATEGIC OBJECTIVES

STRATEGIC OBJECTIVE 1: MOTIVATE THE DOMESTIC AND INTERNATIONAL CONSUMER TO VISIT IRELAND'S ANCIENT EAST.

STRATEGIC INITIATIVES.

1. Deliver on the new domestic and overseas segmentation models which will highlight core opportunities for the region by understanding consumer motivations for travel.
2. Attract more luxury visitors to Ireland's Ancient East from core markets with the aim of attracting higher spending and longer staying visitors to the region.
3. Attract more international visitors to the region particularly from the key source markets of UK, North America, Germany and France.
4. Review the availability and quality of visitor experiences in the region to ensure that they can exceed the expectations of the target market segments.
5. Continue to work with the Cork Convention Bureau and business tourism focussed industry to increased share of high yielding MICE visitor.
6. Continue to attract best prospect domestic consumers to fill mid-week and weekend business across the full calendar year.
7. Provide relevant and timely local information to visitors in-destination through multiple channels. Create and train networks of Local Experts (tourism's frontline employees) on all there is to do and see locally and how best to share this information with visitors.



3.4. BRAND STRATEGY

RATIONALE

Brand Review – Fáilte Ireland is currently conducting a review of the Ireland's Ancient East brand proposition in partnership with our stakeholders, industry and Tourism Ireland. The objectives of the review are to improve domestic resonance, stakeholder adoption and ensure the proposition is inclusive for the broad range of experiences the region has to offer.

The brand proposition review will cement a future vision for the region through an in-depth stakeholder engagement process, with the aim of addressing three core challenges.

These core challenges include a large geography, the proposition being too singular in focus and the visitor's length of stay being too short. Broadening the appeal of the brand and informing the visitor of the things to see and do will make the region more desirable and motivating to visit.

Destination and Experience Development Plans will be the mechanism to enhance the appeal of the brand at a local level.

STRATEGIC FOCUS FOR BRAND STRATEGY – ADDRESSING OUR STRATEGIC OBJECTIVES

STRATEGIC OBJECTIVE 1: MOTIVATE THE DOMESTIC AND INTERNATIONAL CONSUMER TO VISIT IRELAND'S ANCIENT EAST.

STRATEGIC INITIATIVES.

1. Conduct a review of the Ireland's Ancient East brand proposition in partnership with our stakeholders, industry and Tourism Ireland. The objectives of the review are to improve domestic resonance, stakeholder adoption and ensure the proposition is inclusive for the broad range of experiences the region has to offer.
2. Ensure brand alignment between all stakeholders and industry to ensure that messaging around the brand is consistent and in accordance with the brand toolkit.
3. Continue to improve the digital shop window of the region through the Digital That Delivers Programme.

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

STRATEGIC INITIATIVES.

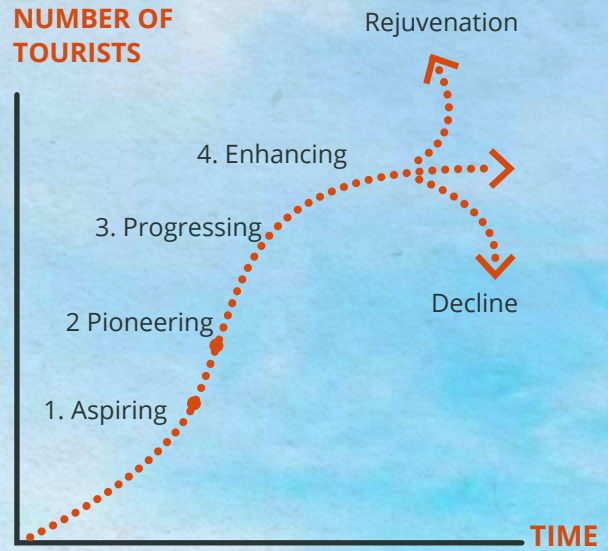
1. Develop a new brand toolkit for stakeholders upon completion of brand proposition review.
2. Deliver a series of brand adoption workshops as part of an ongoing network development programme in each of the destinations.
3. Ensure that the brand proposition informs further tourism capital development in the region aligned to the Regional Tourism Development Strategy, and where appropriate, aligned to DEDPs'.

3.5. DESTINATION DEVELOPMENT STRATEGY

RATIONALE

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**.



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

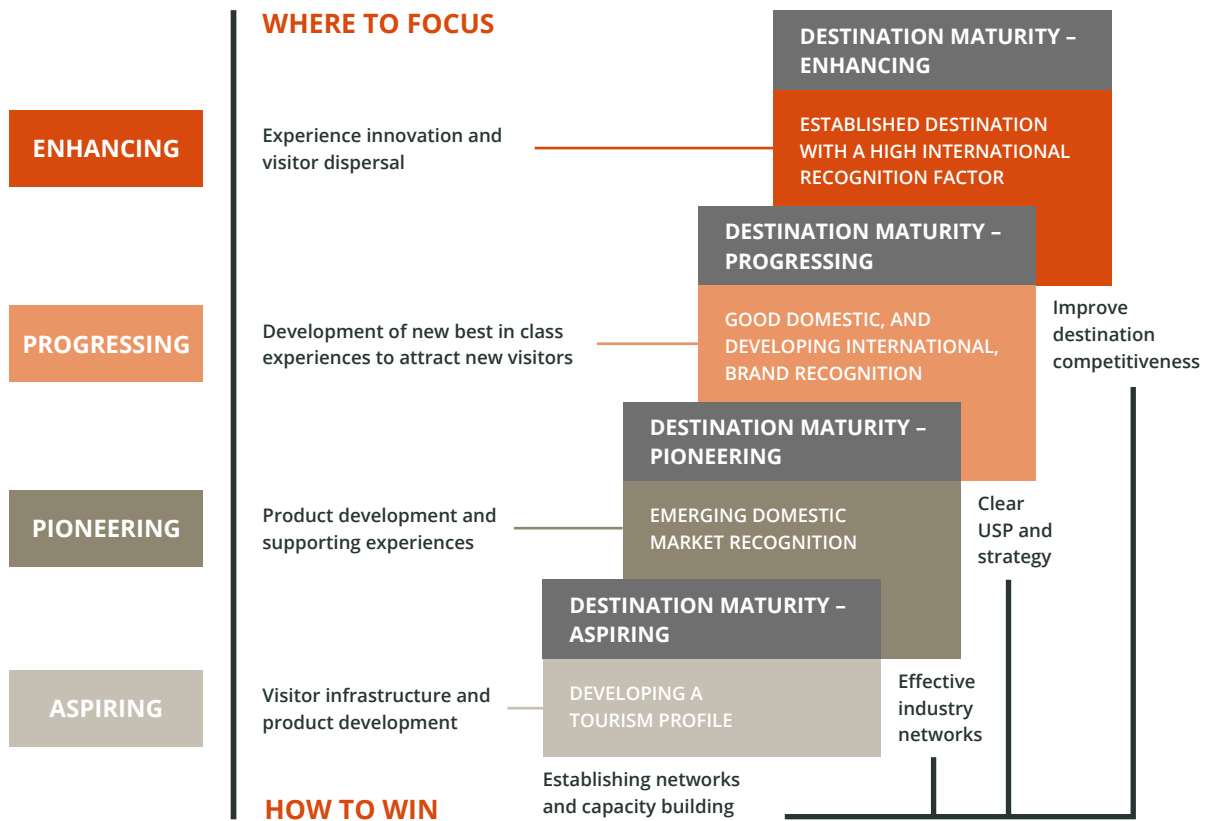


Each maturity level is defined through a set of assessment criteria focused on creating distinctive destinations (see appendices). These include factors such as current levels of recognition within the overseas and domestic markets, density and quality of tourism products and the accommodation base.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

The four destination maturity categories each establish a number of key objectives to be achieved in the course of this regional plan. In destinations

possessing the characteristics of a very mature area (i.e. Enhancing), the core objectives will include visitor experience innovation and visitor dispersal. Areas categorised as Aspiring or Pioneering destinations with lower levels of tourism maturity will 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.



3.5.1. DESTINATION & EXPERIENCE DEVELOPMENT PLANS

This Regional Tourism Development Strategy provides a strategic framework for the sustainable development of the destinations in Ireland's Ancient East. Fáilte Ireland has been developing Destination and Experience Development Plans (DEDPs) in collaboration with local stakeholders for a number of years.

These five-year plans are the detailed action plans through which the strategic objectives in this Regional Tourism Development Strategy will be implemented and organised around the VICE model and will be subject to environmental assessment as relevant.

Strategically, the actions and interventions that are set out in each destination plan are informed by the life stage or maturity level of that destination. Destinations that are at an early stage of development require a different set of interventions and supports to those that are more mature and established.

It is intended that the following DEDPs will be implemented in Ireland's Ancient East over the course of this strategy in association with the relevant stakeholders and industry;

| | |
|----|--|
| 1 | Meath & Louth – Ancient <i>Launched in 2021</i> |
| 2 | Kildare and Tipperary – Thoroughbred Country <i>Launched in 2021</i> |
| 3 | Monaghan <i>Launched in 2022</i> |
| 4 | Cork City, Harbour and East Cork <i>Launching 2023</i> |
| 5 | South Tipperary <i>Launching 2023</i> |
| 6 | Waterford <i>Launching 2023</i> |
| 7 | Wexford <i>Launching 2023</i> |
| 8 | Kilkenny <i>Launching 2023</i> |
| 9 | Wicklow <i>Commence in 2023</i> |
| 10 | Laois <i>Commence in 2023</i> |
| 11 | Carlow <i>Commence in 2023</i> |

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 Dublin, Wild Atlantic Way and Ireland's Hidden Heartlands 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 visitor offering in Louth and Monaghan, in the context of the Ulster Canal redevelopment, cooperation across Carlingford Lough and on the Dublin – Belfast Corridor.

A visitor management plan and new Signage Strategy are being prepared for Slieve Blooms which will be delivered in association with the Ireland's Hidden Heartlands and local stakeholders. A Wicklow and Glendalough masterplan has been developed and future destination planning for Wicklow will be in cooperation with Dublin and relevant agencies.

3.5.2. DEVELOPING VIBRANT TOWNS & VILLAGES

A tourism destination town is one 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. For a tourist to consider a town as a destination where they would stay at least one night, it must broadly have:

- at least one attractor/asset that can drive demand
- a variety of things to do and see
- a variety of places in which to sleep and eat

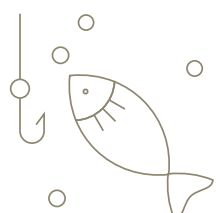
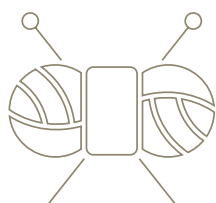
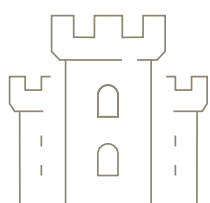
Those towns that provide a wide variety of products, services and experiences can increase visitor dwell time and expenditure in local businesses and communities.

A town that hopes to attract staying visitors must be able to offer them, sufficient attractions, activities and entertainment within the town itself to provide ample engagement for more than eleven hours a day, including three hours in the evening.

They can successfully deliver both a daytime and night-time economy offering. Ideally, tourists will leave the town feeling there was more they could have done or seen and they had not exhausted the opportunities and are eager to return for more.

STRATEGIC INITIATIVES.

1. Create a flow of new and enhanced saleable experiences ready for market so that destinations have a rounded day and night-time offering.
2. In partnership with Local Authorities, **leverage all funding** both public and private to deliver the best tourism outcomes possible for towns and villages in the Ireland's Ancient East region.

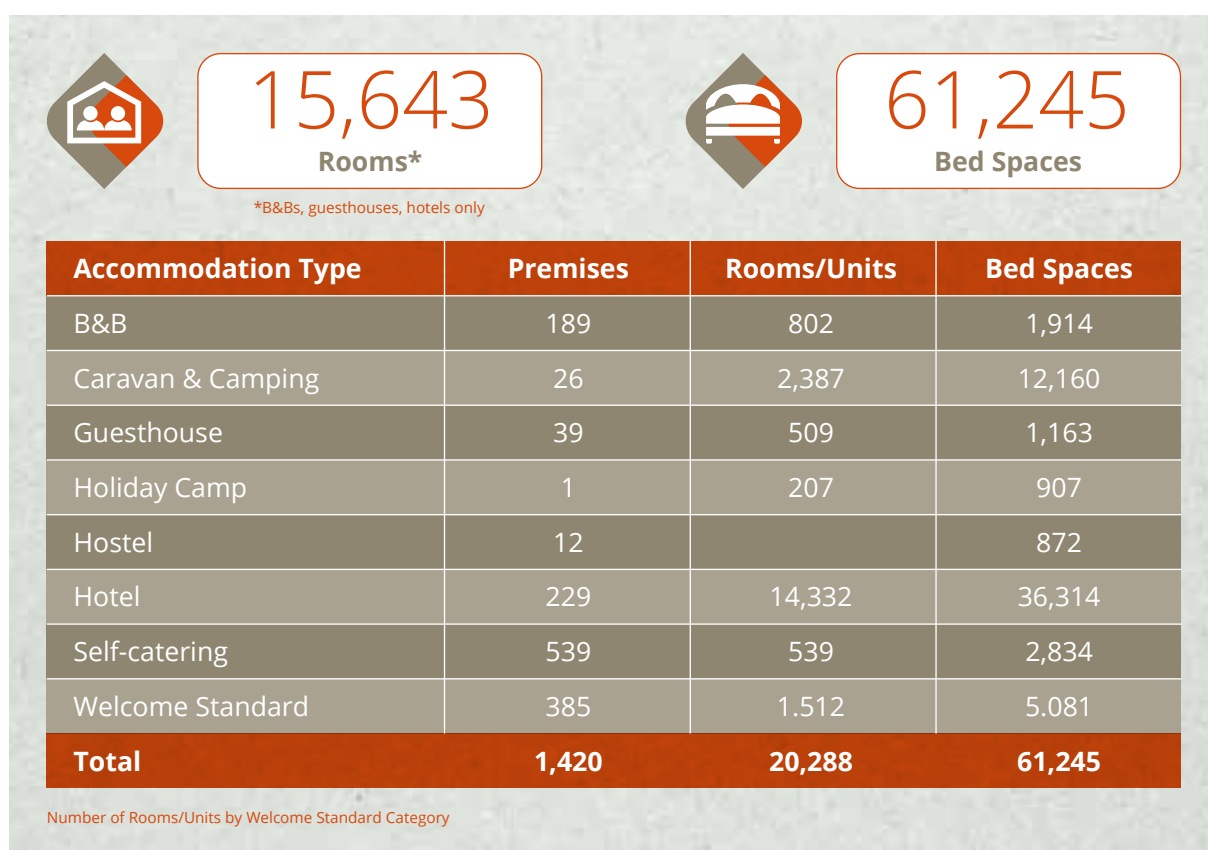


3.5.3. ACCOMMODATION STRATEGY

RATIONALE

The accommodation hubs in Ireland's Ancient East are heavily skewed to the Southern half of the region. The Cork area accounts for 20% of the region's total bedrooms, while the Southeast of the region over indexes in general with Cork, Waterford, Wexford and Kilkenny combined account for 54% of bed stock within the region. Ireland's Ancient East has 20,288 bedrooms in total.

Hotels overly dominate the region's accommodation supply, accounting for 71% of total rooms suggesting new opportunities to diversify the accommodation offering to meet the preferences of more visitor segments. While the recovery period following the Covid-19 pandemic is expected to last until 2026, growth is expected in the accommodation section in Ireland's Ancient East, particularly in the areas of diversification of accommodation types, e.g., in - nature and glamping accommodation.



'Housing for All' is the government's housing plan for Ireland to 2030 www.gov.ie/housingforall. The new housing plan sets out that government will bring forward 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".

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 STRATEGY – ADDRESSING OUR STRATEGIC OBJECTIVES

STRATEGIC OBJECTIVE 1: MOTIVATE THE DOMESTIC AND INTERNATIONAL CONSUMER TO VISIT IRELAND'S ANCIENT EAST.

STRATEGIC INITIATIVES.

1. Increase on-line visibility for all accommodation through the Digital that Delivers Programme.
2. Registration of all unregistered and unapproved accommodation in the region (subject to Short-Term Letting Legislation).

STRATEGIC OBJECTIVE 2: PROVIDE THE VISITOR WITH MORE REASONS TO STAY, INCREASING THE ECONOMIC IMPACT OF TOURISM.

STRATEGIC INITIATIVES.

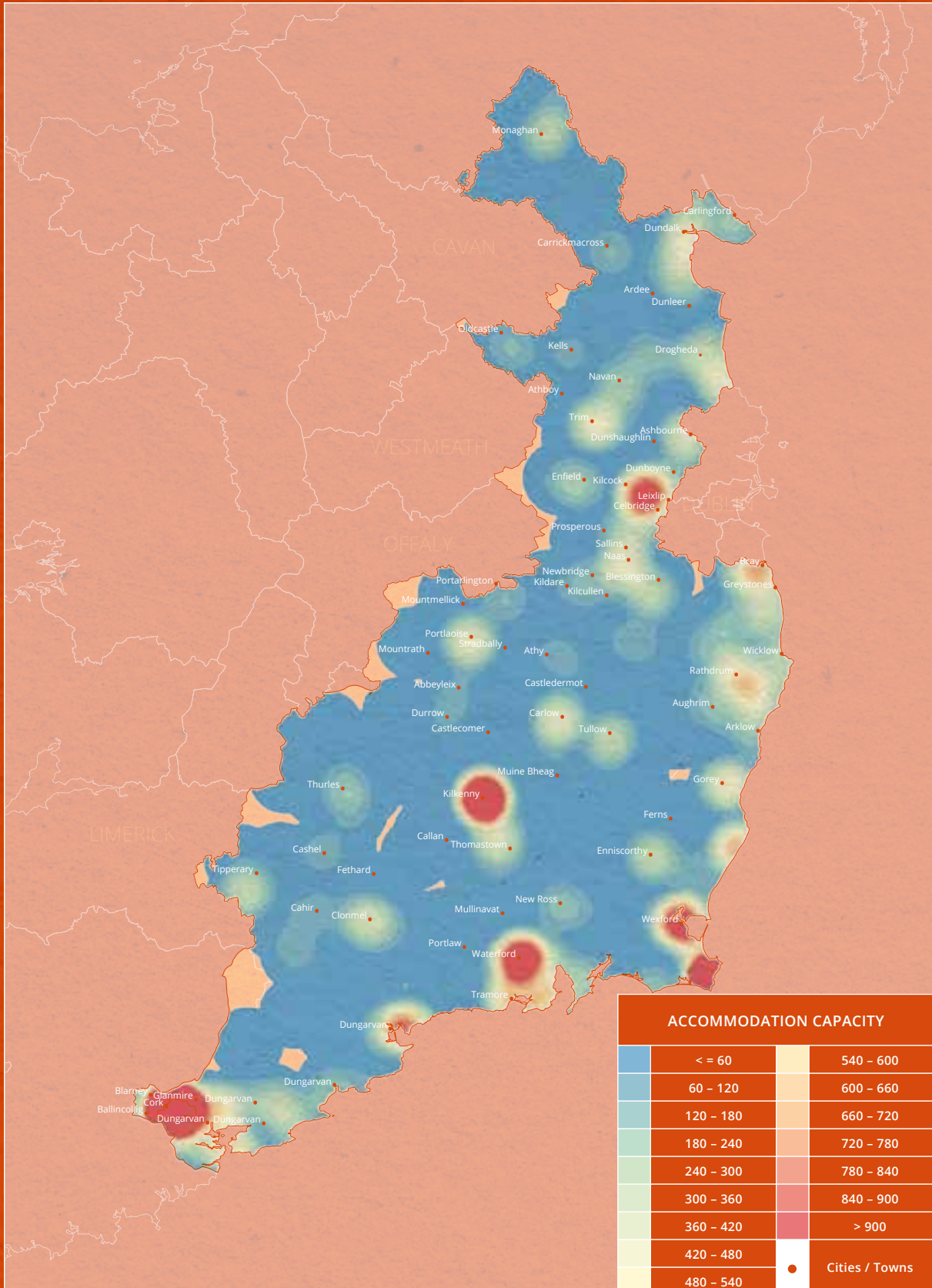
1. Conduct destination-based accommodation audits for each county to scope out what additional accommodation (quantity and type) is required in a specific location. These will inform the expansion and improvement of the accommodation sector in the region in line with the visitor strategy and its related capacity requirements, and in accordance with planning and environmental regulations.

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

STRATEGIC INITIATIVES.

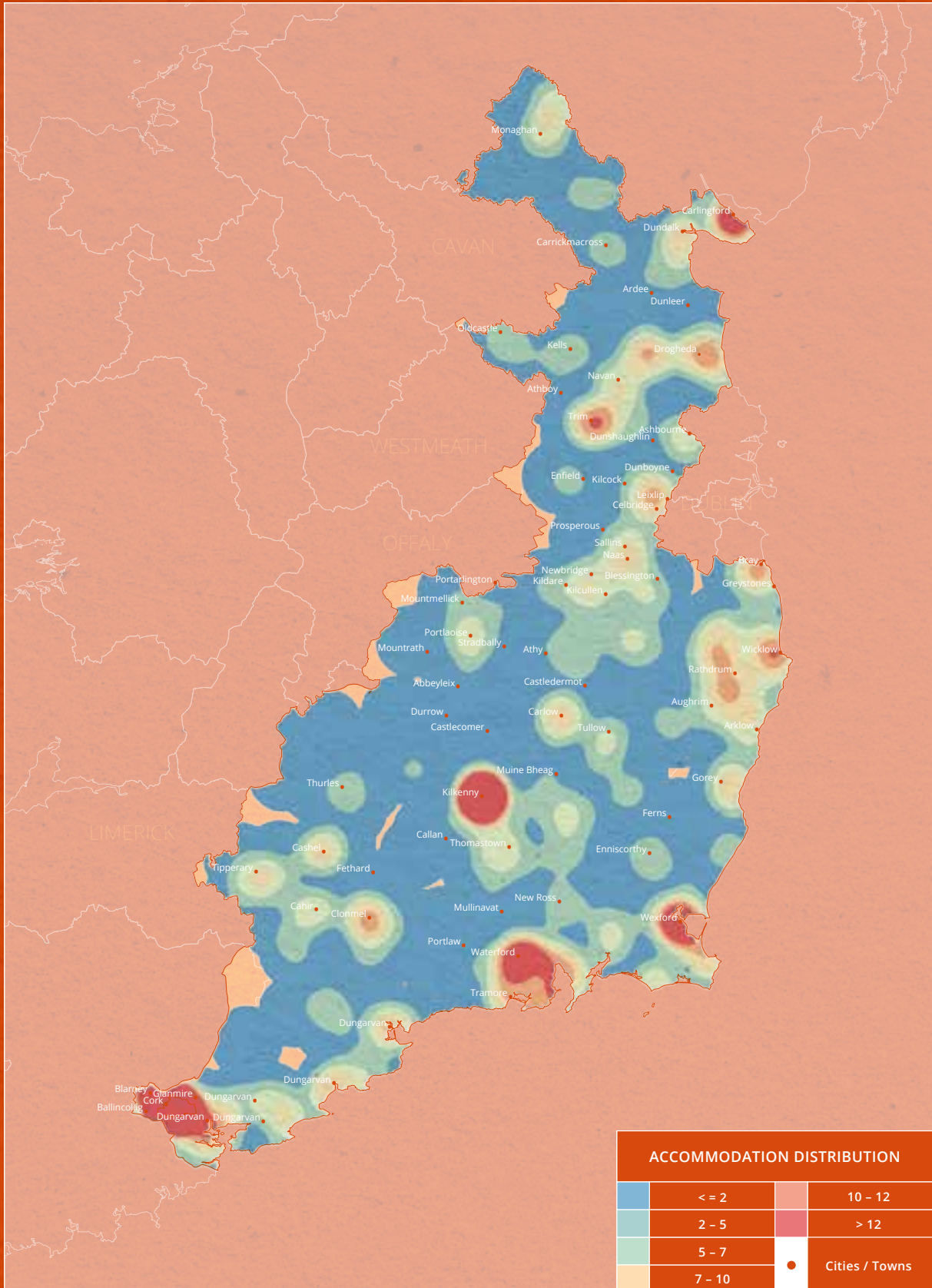
1. Continue accommodation roadshows to recruit additional accommodation into the NQAF.
2. Engage with Local Authorities and the County and City Management Association (CCMA) to support the growth of facilities for camper vans and 'Aires' in suitable and sustainable locations.

ACCOMMODATION CAPACITY – IRELAND'S ANCIENT EAST



Source: Mallon Technology.

ACCOMMODATION DISTRIBUTION – IRELAND'S ANCIENT EAST



Source: Mallon Technology.

3.5.4. 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 Ancient East. 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.

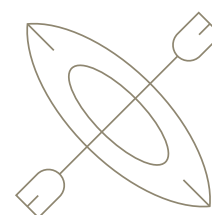
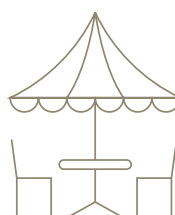
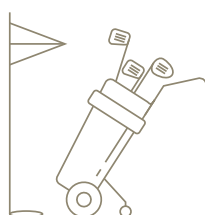
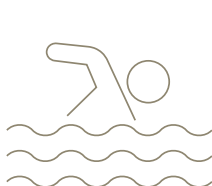
STRATEGIC FOCUS FOR ACCESSIBILITY - ADDRESSING OUR STRATEGIC OBJECTIVES

STRATEGIC OBJECTIVE 2: ENSURE REGION IS EASY TO ACCESS, NAVIGATE AND CONSUME.

STRATEGIC INITIATIVES.

As projects are developed across the region, Fáilte Ireland will aspire to:

1. Develop and create accessible facilities, infrastructure and transport in order to create an environment that is varied, stimulating and easily accessible.
2. Work with Cork Airport, Rosslare Port, Cork Port and other major access points to the region.
3. Ensure tourism literature and other promotional material used in tourism should include clear indications of accessible services and facilities.
4. 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.
5. Increase the availability of adapted and accessible accommodation and tourism amenities, and ensure booking services and websites are accessible for all.



3.5.5. TRANSPORT AND ACCESS

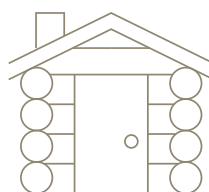
Air and Sea Access

Air access to Ireland's Ancient East 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.

We will work to ensure all industry partners are aware of and actively promoting routes as part of their international marketing and sales activities. Fáilte Ireland will also collaborate with its airport partners to ensure a warm welcome to overseas visitors arriving in their terminals by ensuring that regional branding and imagery are in situ giving a sense of arrival and a sense of place.

Influencing and adding to current visitor flow patterns is critical to the success of Ireland's Ancient East. Historically, visitors tended to drive through the region to the dominant destination towns and iconic attractions. The northern part of the geography does not traditionally experience strong visitor flows and represents a growth opportunity over time. Dispersal will also be a core benefit of supporting key motivations and driving penetration into the region.

Coordinated developments across the Southeast will encourage disruption of visitor flow both through the M9 Motorway and arrivals in through Rosslare Port. The opportunity to drive flow through the Northeast is initially in extending the day trip market and encouraging visitors to stop off from the Dublin-Belfast corridor. This is being executed through the actions of the Ancient DEDP and where relevant, cross border collaboration. Similarly, DEDPs in the mid-East portion of the region aim to disrupt traditional visitor flow through implementation of Thoroughbred Country and other future DEDPs.



Public Transport & EV Charge Points Network

Public transport to Ireland's Ancient East from east coast hubs such as Dublin City and Airport and Cork City is strong with regular bus services operated by the public and private sector. Public transport within counties however is weaker with little to no linkages between towns and visitor attractions or key cities and tourism towns. This is compounded by timetables which are not integrated and can result in it being unviable for the visitor to tour the region by public transport.

The expansion of the electric vehicle charge point network is critical to ensure the visitor experience meets expectations in terms of both avoiding congestion at charge points and ensuring ease of access. The appropriate network of fast and slow charge points requires exponential development to meet visitor needs.

It will work towards our sustainability goals and comply with reduction in combustion engine targets. Particular attention will be paid to identifying means of supporting the accommodation and tourism experiences sector in installing charge points in their car parks, thereby facilitating visitors when they stop for a meal, experience or overnight stay.

STRATEGIC FOCUS FOR DESTINATION DEVELOPMENT – ADDRESSING OUR STRATEGIC OBJECTIVES

STRATEGIC OBJECTIVE 1: MOTIVATE THE DOMESTIC AND INTERNATIONAL CONSUMER TO VISIT IRELAND'S ANCIENT EAST.

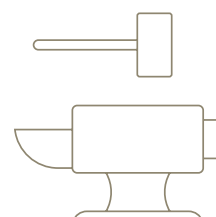
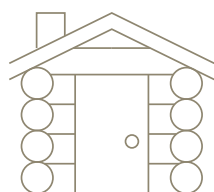
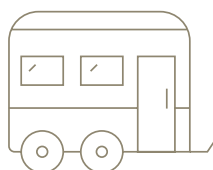
STRATEGIC INITIATIVES.

1. Activate new cross-regional strategic development 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.

STRATEGIC OBJECTIVE 2: PROVIDE THE VISITOR WITH MORE REASONS TO STAY, INCREASING THE ECONOMIC IMPACT OF TOURISM.

STRATEGIC INITIATIVES.

1. In partnership with Local Authorities, leverage available funding to deliver the optimum tourism outcomes for key towns with a strong accommodation base, to 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).
2. Focus on the establishment of a true tourism destination town in the Northern half of the region and further the development of existing tourism destination towns to act as motivators for travel to the region and serve as attractive touring bases from which to explore the broader area.
3. Collaborate accordingly with cross border partners to maximize development opportunities that exist in line with the National Development Plan and All Island Economy programme.



STRATEGIC OBJECTIVE 3: ENSURE REGION IS EASY TO ACCESS, NAVIGATE AND CONSUME.

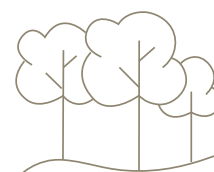
STRATEGIC INITIATIVES.

1. Work with Local Authorities to develop a network of visitor facing connected greenways including Cork to Dublin.
2. Develop and animate the network of tracks and trails to create a transformational Green infrastructural asset, growing sustainable tourism in Ireland's Ancient East.
3. Collaborate with public transport stakeholders (NTA, Local Link etc) to improve connectivity within counties and link major attractions and regional hubs.

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

STRATEGIC INITIATIVES.

1. Develop and Implement DEDPs for all destinations within the region.
2. Create new industry clusters to execute DEDPs aligned to destinations and natural routes to create natural itineraries for Ireland's Ancient East to influence visitor flow and dispersion across the region.



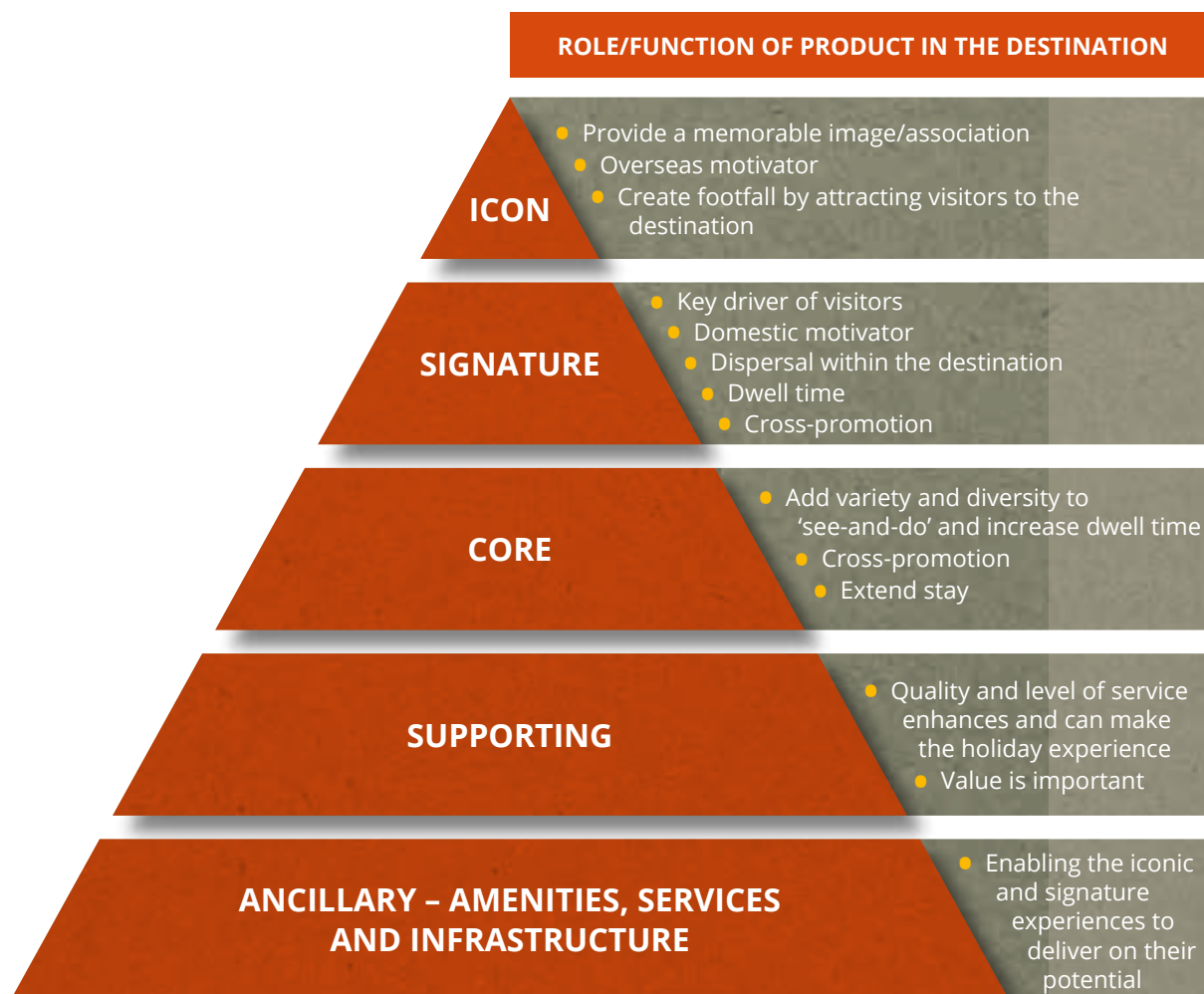
3.6. PRODUCT DEVELOPMENT STRATEGY

RATIONALE

A 'destination-led product development' approach is central to achieving the objectives of the 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 to facilitate the categorisation of products within a destination and the analysis of the function and role these play. Aligning this with the Destination Development Framework will ensure appropriate product development will be undertaken to meet the particular needs of the destination and 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 Recreation schemes and sustainable transportive initiatives to deliver these tourism projects.

Strategic Partnerships

Fáilte Ireland has established strategic partnerships with state bodies that have a key role to play in tourism – Coillte, NPWS, OPW and the Department of Housing, Local Government & Heritage, Waterways Ireland. It is the intention of Fáilte Ireland to seek a second partnership with each partner when the current partnership agreements end. In partnership, we will use the Destination-led Product Development Framework to select future projects which support the region's brand proposition and individual destination objectives, with the agreement of all partners.

STRATEGIC FOCUS FOR PRODUCT DEVELOPMENT – ADDRESSING OUR STRATEGIC OBJECTIVES

STRATEGIC OBJECTIVE 1: MOTIVATE THE DOMESTIC AND INTERNATIONAL CONSUMER TO VISIT IRELAND'S ANCIENT EAST.

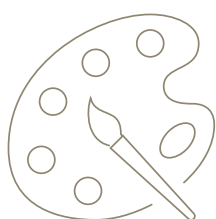
STRATEGIC OBJECTIVE 2: PROVIDE THE VISITOR WITH MORE REASONS TO STAY, INCREASING THE ECONOMIC IMPACT OF TOURISM.

STRATEGIC OBJECTIVE 3: ENSURE THE REGION IS EASY TO ACCESS, NAVIGATE AND CONSUME.

Strategic Product Initiatives

Specific projects for investment at a destination level, especially the provision of strong core and supporting products for iconic attractions, are included in the region's DEDPs. The DEDPs

consider the investment required to ensure that the right tourism product is available in each destination with a focus on retaining and dispersing the visitor more widely within the region



STRATEGIC OBJECTIVE 1: MOTIVATE THE DOMESTIC AND INTERNATIONAL CONSUMER TO VISIT IRELAND'S ANCIENT EAST.

STRATEGIC INITIATIVES.

1. Development of new or improved visitor attractions of scale in partnership with Local Authorities, other government departments, private sector and other stakeholders that deliver culturally engaging experiences which shaped Ireland's Ancient East over 5,000 years to modern day:
 - Medieval Mile Museum and Tholsel Redevelopment Kilkenny.
 - Avondale "Beyond the Trees" Experience.
 - New Ross Norman Experience.
 - Hook Lighthouse.
 - Irish National Heritage Park.
 - Mount Congreve Gardens.
 - Rock of Cashel Visitor Centre / Cashel Town Plan.
 - Drogheda attraction of scale feasibility.
 - Trim Castle.
 - Scope out potential for an attraction of scale linked to Carlingford Vision '31 through DEDP process.
 - Scope out potential for an attraction of scale in both Cork and Waterford cities, and Monaghan through DEDP process.
 - Work with Local Authorities to ensure the visitor needs are to the fore of large-scale urban developments such as the Cork docklands, Waterford North Quays development and Kilkenny Abbey Quarter.

STRATEGIC OBJECTIVE 2: PROVIDE THE VISITOR WITH MORE REASONS TO STAY, INCREASING THE ECONOMIC IMPACT OF TOURISM.

STRATEGIC INITIATIVES.

1. Work with Local Authorities and other stakeholders to deliver projects that have potential to transform and re-imagine urban centres for the visitor while also creating vibrant and creative communities:
 - Deliver Fáilte Ireland schemes including Destination Towns, Outdoor Dining and Urban Animation.
 - Work with Local Authorities on RRDF / URDF and Towns and Village Renewal Schemes to deliver improved amenities and attractions for the visitor.
 - Work with Local Authorities to ensure the visitor needs are to the fore of large-scale urban developments such as the Cork docklands, Waterford North Quays development and Kilkenny Abbey Quarter.
2. Deliver supporting experiences in key clusters/hubs to improve on the quality and variety of experiences available to visitors to slow the visitor down and increase dwell time and local spend through a small grants scheme. These clustered experiences will contribute to the establishment of Ireland's Ancient East as one of Europe's leading cultural and heritage destinations renowned for enjoyment of unique experiences in stunning landscapes.
 - Provide strategy support and cluster platforms for the development of food tourism networks and trails across the region to enable the visitor to experience the food provenance of destinations.
 - Build on the Government focus on the night-time economy to partner with Local Authorities in creating varied and sustainable night-time offerings in key urban hubs within the region.

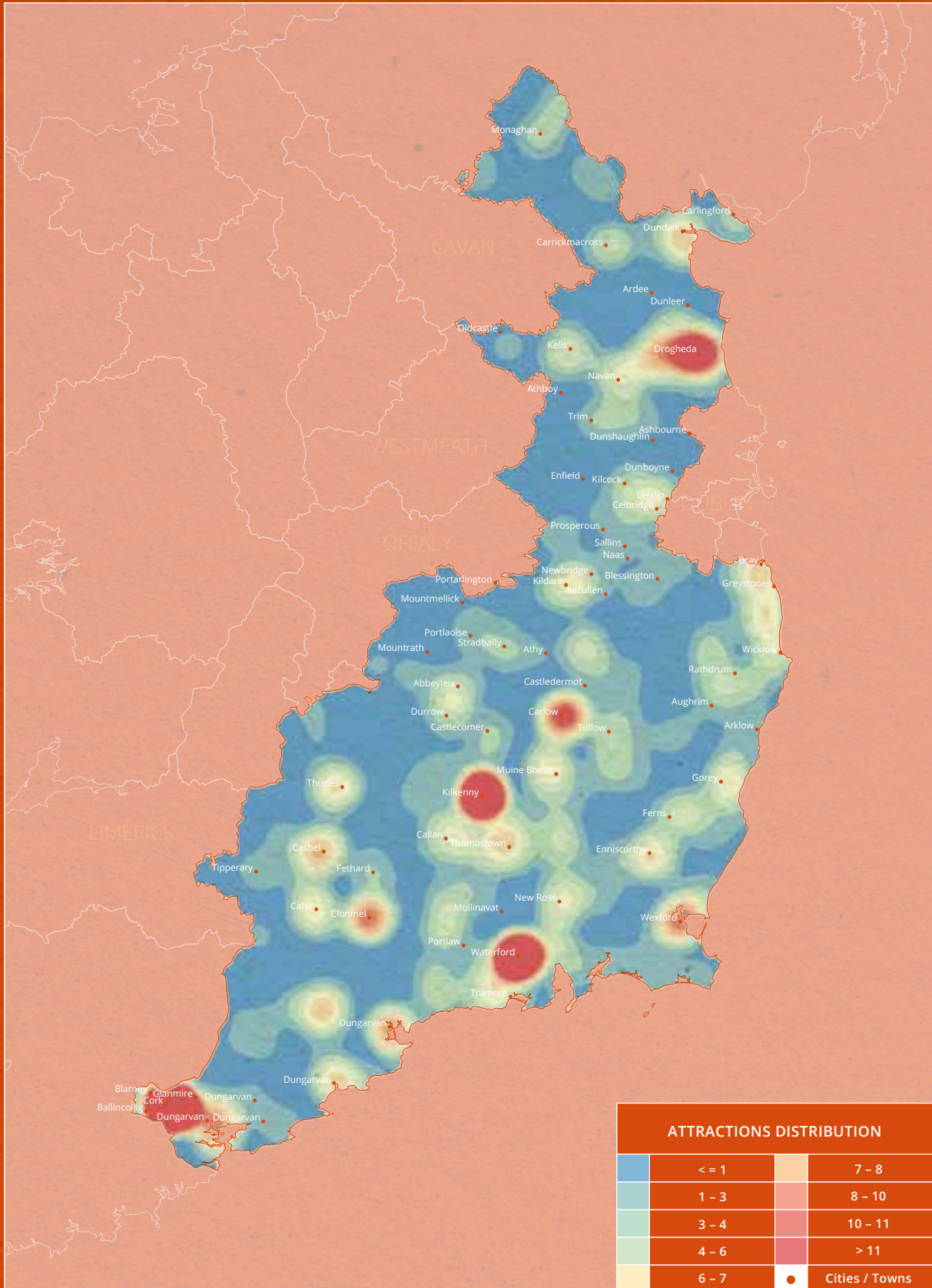
STRATEGIC OBJECTIVE 3: ENSURE THE REGION IS EASY TO ACCESS, NAVIGATE AND CONSUME.

STRATEGIC INITIATIVES.

1. Develop the network of visitor facing greenways, blueways, tracks, trails and routes to help the visitor navigate the region, connecting the landscape, hubs and attractors and supporting the development of sustainable tourism in Ireland's Ancient East:
 - Develop a series of visitor facing trails and routes throughout the region including:
 - *A network of connected Greenways / dedicated cycle routes including a world class visitor proposition connecting Cork to Dublin.*
 - *A network of visitor facing coastal and inland walking trails led by Local Authorities and supported by Fáilte Ireland.*
 - *Development of the International Thoroughbred Trail.*
 - *Re-imagine the Boyne Valley Drive from a driving route to multi modal route linked to towns and connecting world class heritage sites.*
 - *Redevelopment of the Ancient Táin Trail.*
 - Improve trail infrastructure, orientation and navigation in cities and towns through Destination Towns Scheme, ORIS, Active Travel and others in partnership with the Local Authorities.
 - Initial reviews have been undertaken by Fáilte Ireland regarding the development of The Irish Seaway to understand the existing infrastructure. This is a long-term investment project that will require dedicated Government investment to deliver. In the meantime, we will ensure that coastal trails are integrated into the visitor offering and seek to influence a connected network of trails where possible.

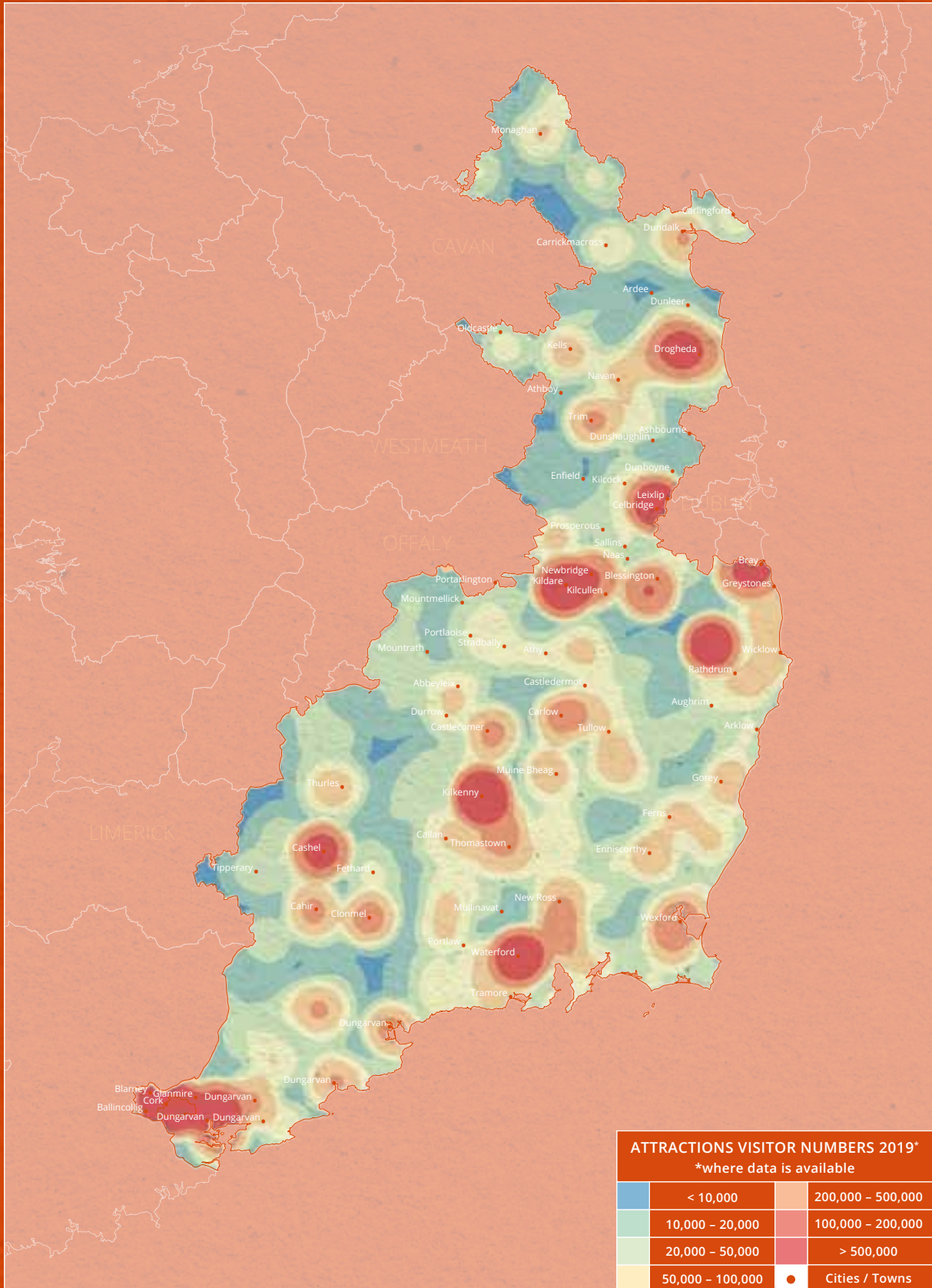
2. Improve the outdoor infrastructure within Ireland's Ancient East:
 - Deliver a suite of water sports facility centres across the region (both coastal and inland) to enhance and expand the quality and seasonality of water-based activities.
 - In partnership with Coillte, develop new and enhanced mountain bike experiences at Ballinastoe and in the Slieve Blooms with the addition of new visitor trail head buildings and additional and upgraded trail networks.
 - Capitalising on the Glendalough Masterplan, Wicklow National Park and the large-scale investment in Avondale to develop Wicklow as a key national outdoor destination by leveraging the Dublin Mountains to create an activity hub of scale.
 - Support the development of Carlingford and Cooley Peninsula as an iconic adventure destination in the northern part of Ireland's Ancient East. This will motivate target market segments to visit and stay in the northern part of the region in line with with Carlingford Vision '31.
 - Work with Ireland's Hidden Heartlands team, Local Authorities in Laois and Offaly, Coillte and NPWS through a partnership approach to help the Slieve Bloom realise its potential as an outdoor recreation destination to enhance the visitor experience and provide direction for future action, implementation, resources, and investment over the next three to five years.
 - Capitalise on the potential of Cork Harbour and its islands and the docklands regeneration as a leisure tourism destination on the doorstep of the City, integrating the harbour river and City as a USP.
 - Support the development of coastal tourism experiences in East Cork, Waterford, Wexford, Wicklow, Meath and Louth.

ATTRACTIONS DISTRIBUTION – IRELAND'S ANCIENT EAST



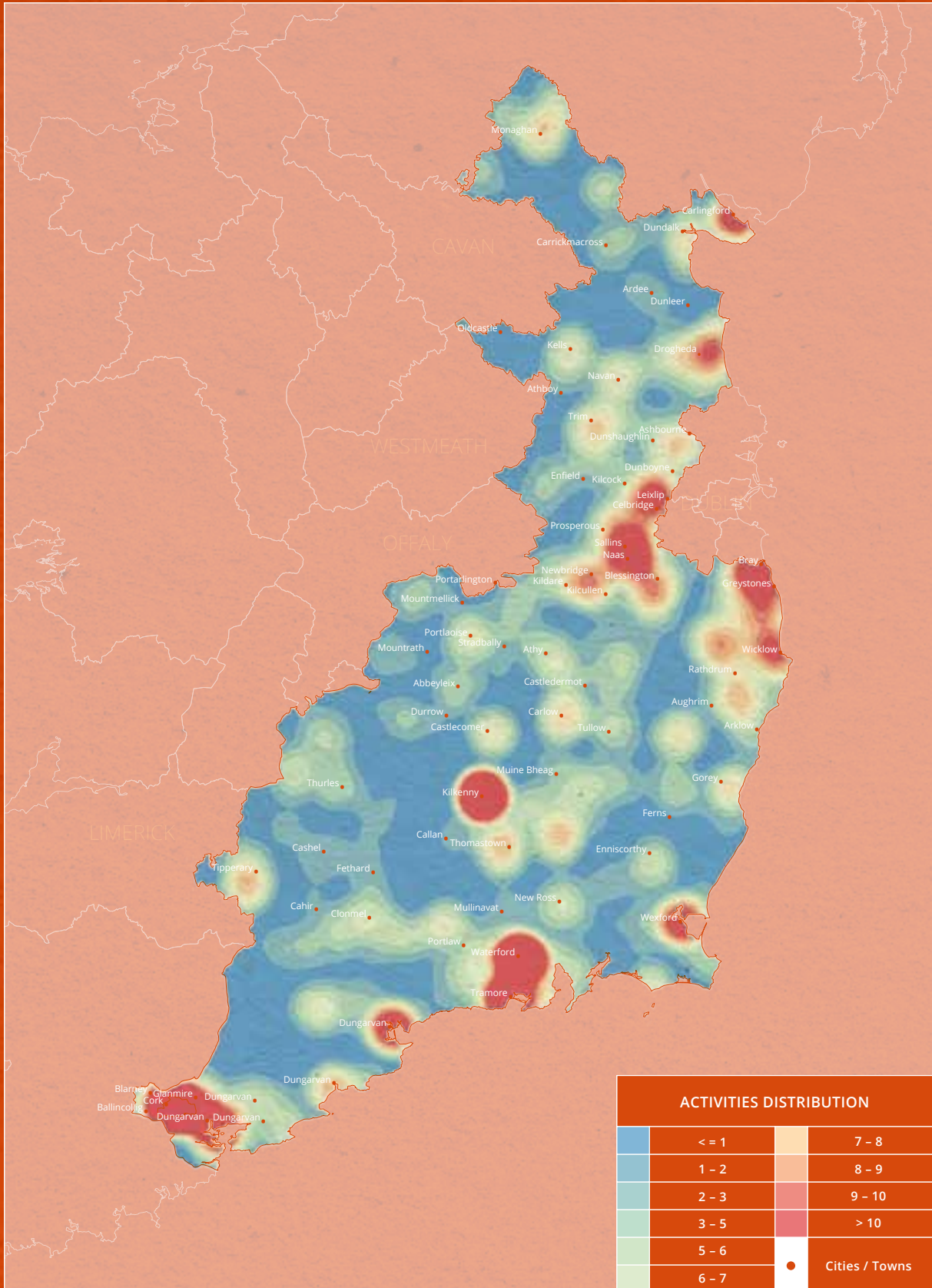
Source: Mallon Technology.

ATTRACTIONS VISITOR NUMBERS 2019 – IRELAND'S ANCIENT EAST



Source: Mallon Technology.

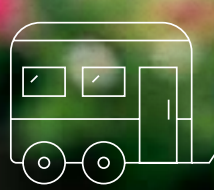
ACTIVITIES DISTRIBUTION – IRELAND'S ANCIENT EAST



Source: Mallon Technology.

In considering all of the above the following should be noted:

- 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.
- 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.



3.6.1. FESTIVALS STRATEGY

RATIONALE

Fáilte Ireland's strategic vision for festivals in Ireland's Ancient East is to focus on developing festivals and events that are of impact and scale and that increase 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.

We will continue to work with strategic festivals that have USP's and offerings that are unique to Ireland's Ancient East. We will help them build stronger networks of their own through targeted domestic and international supports and by raising awareness of these festivals, Ireland's Ancient East will become synonymous with its own unique portfolio of Festivals.

STRATEGIC FOCUS FOR FESTIVALS – ADDRESSING OUR STRATEGIC OBJECTIVES

STRATEGIC OBJECTIVE 1: MOTIVATE THE DOMESTIC AND INTERNATIONAL CONSUMER TO VISIT IRELAND'S ANCIENT EAST.

STRATEGIC INITIATIVES.

The Fáilte Ireland International Festival strategy includes the development of a Global Festival Proposition. These iconic festivals and themed propositions will motivate international visitors to Ireland's Ancient East, generate significant economic impact and support the night-time economy:

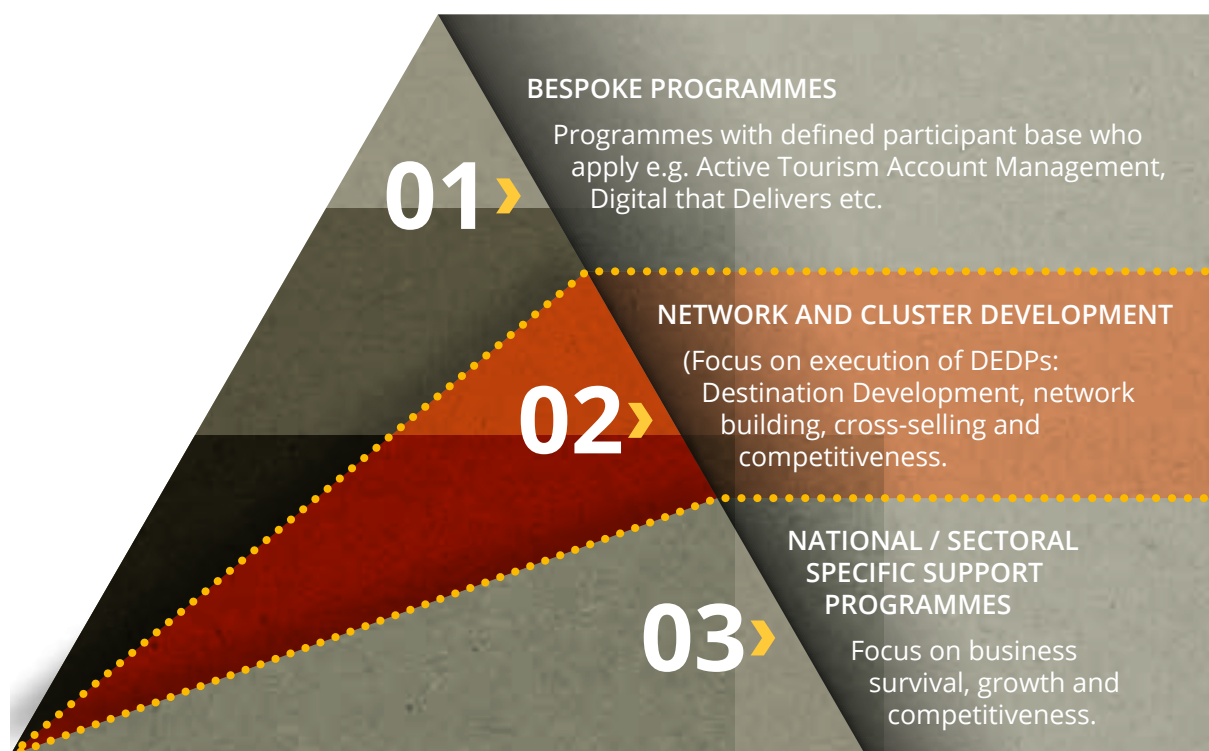
1. Grow Púca as an authentic festival embedded in the international proposition of Ireland, Home of Halloween, to attract international visitors to the northern part of Ireland's Ancient East.
2. Develop a Festival of scale in Cork City that assists sector recovery, increases seasonality, increase visitor spend, grows bed nights and positions Cork as a 'must see destination'.
3. Examine the opportunity to develop destination festival(s) around the Thoroughbred that offers a compelling international proposition.
4. Partake in Developing Festivals Scheme for outdoor activity to attract domestic and international visitors to Ireland's Ancient East in the shoulder season. This scheme will allow Fáilte Ireland to leverage the region's extensive greenway and trails network.
5. Conduct feasibility and research on St. Brigid and its potential as an international festival series proposition.
6. Continue to develop and promote the Regional St Patrick's Festivals in Kilkenny, Waterford and Cork.
7. Continue to support and develop strategic festivals with the potential to attract both domestic and international visitors to Ireland's Ancient East with multi annual funding commitments.
8. Continue to work with Local Authorities on the Regional Festival Fund and focus our investment in local and community tourism focused Festivals to enhance the visitor experience.

3.7. INDUSTRY DEVELOPMENT STRATEGY

RATIONALE

We will work with our tourism industry to ensure they are supported to grow and maintain competitiveness through collaboration at a destination level and to ensure that they are primed to deliver on the agreed outputs of their DEDP resulting in a step change for the destination.

No tourism business in the region will be without access to relevant capability building supports. These supports will be flexed over the course of the economic cycle, progressing from measures focused on business survival, to recovery and from there onto supporting sustainable growth strategies at the level of the destination and individual enterprise. Our core focus will be sustained on the following:



Source: Fáilte Ireland.

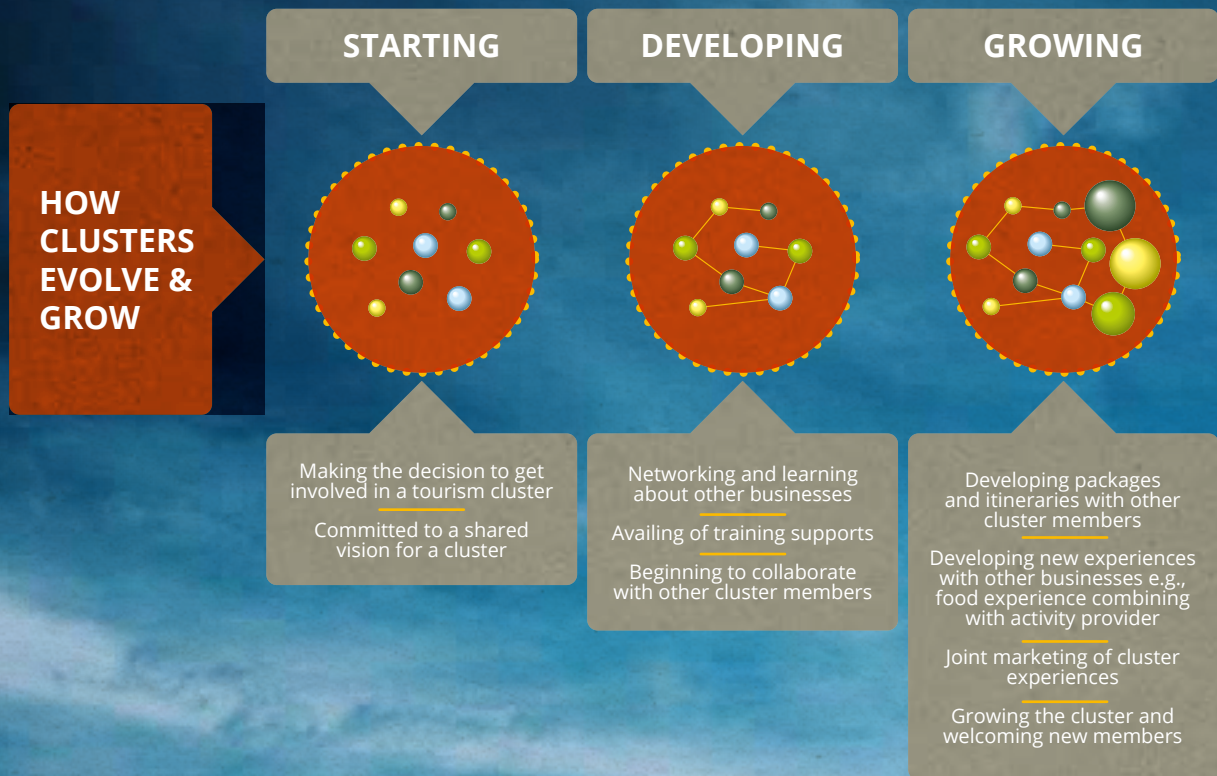
Account Management – The Ireland's Ancient East regional team engage with industry on a regular basis through the Account Management process to provide a streamlined and supportive two-way communication and engagement structure.

Network and Cluster Development – The agreed development goals of the destinations as outlined in their DEDPs will be achieved through a *Cluster Development Programme Framework*.

It will be based on programme creation relative to the destination maturity level. Destinations across

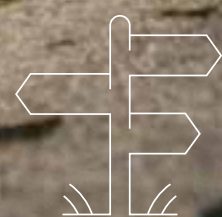
the Ireland's Ancient East are at different stages of development and destination maturity.

The future focus on network development will be appropriate to each area's respective level of maturity, ensuring that the right interventions and supports are delivered at the right time.



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 specific destinations.



Newgrange Megalithic Passage Tomb, County Meath.

STRATEGIC FOCUS FOR INDUSTRY DEVELOPMENT – ADDRESSING OUR STRATEGIC OBJECTIVES

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

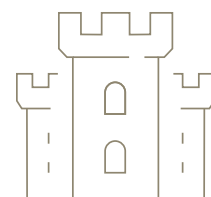
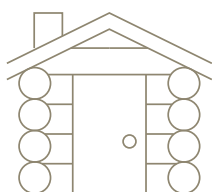
STRATEGIC INITIATIVES.

1. Deliver modular programmes for clusters across DEDPs relevant to their maturity level to increase collaboration, execute DEDP initiatives and improve industry adoption of the brand.
2. Deliver specific targeted projects with select industry to accelerate growth that will benefit the wider destination.
3. Work with a number of other State Agencies, such as SEAI, and industry groups to support the industry in reaching its carbon reduction targets and support the uptake of sustainability measurement and certification programmes at both enterprise and destination levels.

STRATEGIC OBJECTIVE 4: ENABLE AND ASSIST THE INDUSTRY TO GROW ITS CAPACITY AND CAPABILITY SO THAT IT CAN THRIVE OVER THE PERIOD OF THIS STRATEGY AND CREATE SUSTAINABLE JOBS IN LOCAL COMMUNITIES.

STRATEGIC INITIATIVES.

1. Ensure industry concerns inform and prioritise the development of Fáilte Ireland support programmes.
2. Step change the digital capability, online presence and connected distribution of industry through the Digital that Delivers Programme.
3. Harness a new online learning platform to ensure all businesses have access to relevant content that can be consumed at a pace that they can control.
4. Provide labour supply and employee development programmes and build sufficient awareness of complementary supports through other bodies such as LEO and ETB within given catchments.



3.8. DISTRIBUTION AND BUSINESS DEVELOPMENT STRATEGY

RATIONALE

In the context of Destination and Experience Development Plans, the big prize for local industry is targeted distribution building measures with Irish Inbound Agents. By adopting this approach we can clearly demonstrate how each DEDP is working and its impact on the distribution map for Ireland.

The focus will be on ensuring the product remains refreshed and exciting for tour operators with consistent destination appeal. The Northern half of Ireland's Ancient East is not as recognised internationally with a huge opportunity for growth. The focus here will be on driving new and incremental business opportunities and raising its profile as a compelling destination for the international visitor.

Distribution Plans will be prepared for each of the DEDPs in Ireland's Ancient East that are developed over the next five years, in accordance with the regional and destination level of maturity.

These distribution plans will vary in focus from building on existing progress made with the domestic market, to gaining a foothold in key overseas markets, and market diversification particularly in Great Britain, the United States, France and Germany.



Source: Fáilte Ireland.

Digital that Delivers Programme

Fáilte Ireland will support tourism businesses enhance their digital presence and capability through the Digital That Delivers Programme. The initial focus will be on the attractions, activities and tours 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 to enhance their own websites and digital marketing content, while also optimising their digital channel performance.

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

STRATEGIC OBJECTIVE 1: MOTIVATE THE DOMESTIC AND INTERNATIONAL CONSUMER TO VISIT IRELAND'S ANCIENT EAST.

STRATEGIC INITIATIVES.

1. Continually gather insights from buyers, consumers and key distribution intermediaries in order to inform the development of commercially focussed saleable visitor experiences.
2. Prepare a Distribution Plan for each DEDP prepared in Ireland's Ancient East in accordance with destination maturity level.
3. Provide training interventions such as: sales pitching, selling skills, market entry, market diversification, sales plan development to ensure our industry can be the best possible trading partners supporting our ambitions of 'ease of doing business' in Ireland.
4. Provide multiple opportunities for experience providers to engage with Irish based inbound agents across a range of platforms.
5. 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.
6. Fáilte Ireland will provide a number of additional supports to all elements of the industry such as tour operators in order to support their destination programming.
7. Secure incremental distribution for new products emerging from DEDPs and provide industry with opportunities to rebuild the pipeline of overseas business for their existing product.



3.8.2. BUSINESS TOURISM IN IRELAND'S ANCIENT EAST

RATIONALE

Business tourism has the capacity to support the sustainability of businesses as a result of its higher yielding visitors and strong shoulder season profile. The recent strong growth in business tourism to the regions demonstrates there is a market that is not displacing business from Dublin.

Regional Convention Bureaux partners are critical to the conversion of conference and meetings leads. The region has some excellent resort product and golf courses which can lend itself to the incentive marketplace. Its proximity to Dublin can make it an ideal 'book-end' to an Ireland trip. The key opportunities for Cork as a business tourism destination lie with its current strength of knowledge-based bidding.

The destination has a strong base for association conferences with a developed network of ambassadors supported by the local university and leading research centres. The re-imagined ambassador programme from Fáilte Ireland will strengthen this further and is supported by the sectoral strengths research.

Support for business tourism recovery in Cork will build on the destination strengths in knowledge-based bidding. Continued support for association conferences ambassadors and a re-imagined ambassador programme will strengthen this further. A strong multi-national presence in the Cork area provides a platform for recovery and growth and an opportunity to leverage Cork Airport's future connectivity to key hubs.

STRATEGIC FOCUS FOR BUSINESS TOURISM – ADDRESSING OUR STRATEGIC OBJECTIVES

STRATEGIC OBJECTIVE 2: PROVIDE THE VISITOR WITH MORE REASONS TO STAY, INCREASING THE ECONOMIC IMPACT OF TOURISM.

STRATEGIC INITIATIVES.

1. Support Cork Convention Bureau (CCB) to attract global conferences, leveraging the new Cork Convention Centre once open to attract higher yielding visitors to the region. Ensure the necessary leads conversion incentives are in place to support CCB convert opportunities.
2. Knowledge based bidding: targeting research and subsequent bids around the extensive work on sectoral strengths will increase our opportunity to convert business. Bringing to the fore the mix of academia, research and industry, we can benefit clients more and help create a strong impact for their business events.
3. Ensure sustainability is a cornerstone of tourism development and key consideration factor for broader planning, to address the concerns around carbon footprint and the wider UN Sustainable Development Goals in bidding to win business.
4. Develop a gala dinner investment scheme which will close a product gap in the region for attracting conference and incentive business.
5. Continue destination development efforts targeting MICE business through unique experiences such as Thoroughbred Country and resort and incentive product base.
6. Leverage the world-renowned golf product in the region to maximise opportunity to grow business tourism.

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 Ancient East by inspiring them to visit the region.

STRATEGIC FOCUS FOR MARKETING – ADDRESSING OUR STRATEGIC OBJECTIVES

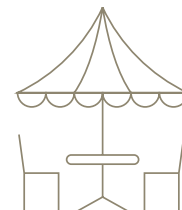
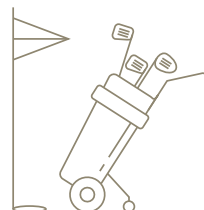
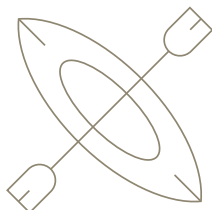
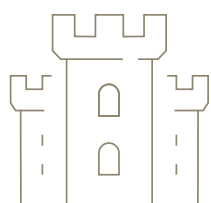
STRATEGIC OBJECTIVE 1: MOTIVATE THE DOMESTIC AND INTERNATIONAL CONSUMER TO VISIT IRELAND'S ANCIENT EAST.

STRATEGIC OBJECTIVE 2: PROVIDE THE VISITOR WITH MORE REASONS TO STAY, INCREASING THE ECONOMIC IMPACT OF TOURISM.

Marketing Programming

Ireland's Ancient East 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 Ancient East 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

Ireland's Ancient East resonates well with overseas markets but has had mixed success with the domestic audience in driving intent to travel and visitation.

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 Ancient East by inspiring 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 FOCUS FOR MARKETING – ADDRESSING OUR STRATEGIC OBJECTIVES

STRATEGIC OBJECTIVE 1: MOTIVATE THE DOMESTIC AND INTERNATIONAL CONSUMER TO VISIT IRELAND'S ANCIENT EAST.

STRATEGIC INITIATIVES.

1. International and national marketing campaigns aligned to the DEDPs with trails, and itineraries and signature experiences to motivate booking of longer breaks across all channels.
2. Domestic and international campaigns to raise awareness of the destination towns and accommodation hubs in the region and the range of visitor experiences in their surrounds.
3. Domestic marketing campaigns to raise awareness of and drive consideration for Ireland's Ancient East, focusing on the 'hidden gems,' and experiences which align with current consumer search preferences and demands.
4. Drive consumers to the discoverireland.ie website, leveraging Keep Discovering campaign to drive profile, referrals and bookings to businesses across the region.
5. Continue to improve the digital shop window, online book-ability and connected distribution of the region through the Digital That Delivers Programme.
6. Increase utilisation of all digital assets by marketing and the trade and have social media ambassador programmes / joint marketing campaigns in DEDP areas to align messaging.
7. Deliver on the new segmentation which will highlight core opportunities for the region.
8. 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-based consumer marketing activities. Both agencies will also pool Ireland's Ancient East destination and product content to support Irish industry in its own marketing and sales development efforts.

3.10. COMMUNITY ENGAGEMENT

RATIONALE

The landscape, people and communities, together with their culture and heritage, are key assets of Ireland's Ancient East and are critical to its success. Increased exposure to the culture of the region will heighten visitors' desire to return and explore other parts of Ireland's Ancient East.

Local communities need to feel a sense of ownership and engagement with the brand as tourism should be a positive and regenerating force, contributing to the creation of flourishing places and thriving communities. Tourism 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.

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 in every county in Ireland. Satisfaction or otherwise with tourism among local communities, (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

Communities also play another crucial role in destinations throughout the region through community owned and run enterprises. In 2019, research was commissioned into the nature and socio-economic impacts of community-based tourism across Ireland's Ancient East. These enterprises reflect the inherent strengths of community enterprises throughout the region based on heritage, culture and outdoor activities. These strengths are supported by a significant arts, foods and festivals sector.

Pre-COVID, 70% of visitors to community tourism projects were from within Ireland. That domestic appeal gives us a great base to build on as our communities recover.

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 Ancient East will be significantly strengthened. Direct contact with local community groups through the DEDP process and cluster development work will ensure sustainable development in a manner which does not negatively impact the local community.

THE FINDINGS OF THE RESEARCH WERE AS FOLLOWS:

1M+
VISITORS YEARLY

€31.2M
DIRECT AND INDIRECT VALUE OF
58 IRELAND'S ANCIENT EAST PROJECTS

OUR BASELINE MAPPING SHOWED THAT THESE PROJECTS SUPPORT:

190
FTE JOBS IN RURAL AREAS

67
FULL-TIME JOBS

246
PART-TIME JOBS

987
VOLUNTEERS ACTIVELY SUPPORT THESE
COMMUNITY TOURISM PROJECTS

CHALLENGES FACING THE SECTOR:

1. POOR GOVERNANCE STRUCTURES
2. LACK OF STRATEGIC PLANNING AND COMMERCIAL MANAGEMENT (REFLECTING THE 'SUPPLY' VS 'DEMAND' FOCUS).
3. ACCESS TO CAPITAL AND OPERATIONAL FUNDING.
4. INSURANCE IS BECOMING INCREASINGLY ONEROUS (FOR FESTIVALS, EQUIPMENT, ACTIVITIES).
5. TARGETED MARKETING AND PROMOTIONAL CAPACITY ARE CHALLENGING.
6. LACK OF CAPACITY FOR COMMERCIALISATION OF OPPORTUNITIES.
7. BURN-OUT OF VOLUNTEERS WHO ARE THE LIFE-BLOOD OF MANY COMMUNITY ENTERPRISES.
8. COVID-19 IMPACTS IN THE YEAR 2020 HAVE BEEN DEVASTATING FOR MANY SMALL TOURISM ENTERPRISES. MANY WILL REQUIRE SIGNIFICANT SUPPORTS TO EMERGE INTO A TRADING POSITION POST-PANDEMIC.

STRATEGIC FOCUS FOR COMMUNITY ENGAGEMENT – ADDRESSING OUR STRATEGIC OBJECTIVES

STRATEGIC OBJECTIVE 4: ENABLE AND ASSIST THE INDUSTRY TO GROW ITS CAPACITY AND CAPABILITY TO ENSURE THAT IT CAN THRIVE OVER THE PERIOD OF THIS STRATEGY AND CREATE SUSTAINABLE JOBS IN LOCAL COMMUNITIES.

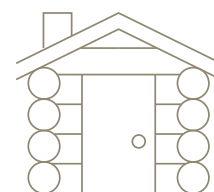
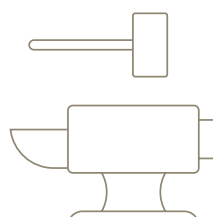
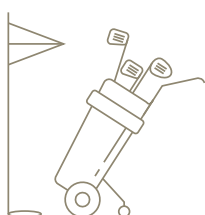
STRATEGIC INITIATIVES.

1. Encourage usage of Fáilte Ireland's *Tourism in the Community: A Business Toolkit for Community Tourism Projects*, in working with local community tourism projects by developing an online tutorial and delivering workshops through clusters.
2. Bespoke training in governance, strategic planning commercial development and operational management for voluntary Boards.
3. Provide training and mentoring support for community-based tourism enterprises and services to ensure that they are placed on a sustainable footing.

STRATEGIC OBJECTIVE 5: BUILD COMMITTED STAKEHOLDER AND INDUSTRY PARTNERSHIPS 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 engaging them in destination development planning. Ensure that any concerns about potential negative impacts of tourism on local communities are highlighted and addressed at an early stage.
2. Promote the socio-economic benefits that well-managed and sustainable tourism brings to local communities.
3. Networking of community enterprises, to create regional brand awareness and sense of 'all working together' where enterprises are aware of what each offers; cross-refer and point visitors onwards to another experience.
4. 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.
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.



3.11. ENVIRONMENTAL PROTECTION & PROMOTION

RATIONALE

The Regional Tourism Development Strategy for Ireland's Ancient East 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.

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 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 (RSEs) and lower tier Development Plans and Local Area Plans.

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)¹ under the European SEA Directive and transposing Regulations; and Stage 2 Appropriate Assessment (AA)² 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

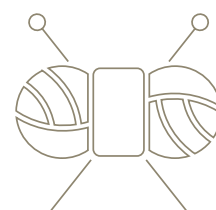
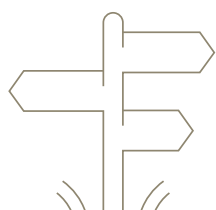
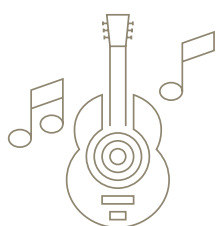
Monitoring

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 Appendix 2-8.

- Site Maintenance Guidelines;
- Visitor Management Guidelines; (while these Guidelines are branded for the Wild Atlantic Way, the principles & objectives are applicable to all Fáilte Ireland Tourism regions)
- Environmental Management for Local Authorities and Others
- Environmental Damage Resolution Procedure
- Greenway Visitor Experience & Interpretation Toolkit
- Environmentally Responsible Promotion – Statement
- Blueway Development & Management Guide
- Sustainable Recreational Trail Development & Operation (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 well-being" 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.

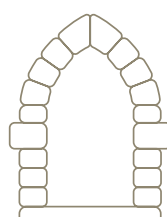
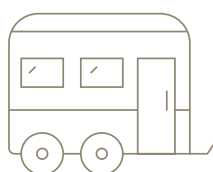
Site Management

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 decarbonising 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 FOCUS FOR ENVIRONMENTAL SUSTAINABILITY – ADDRESSING OUR STRATEGIC OBJECTIVES

STRATEGIC OBJECTIVE 1: MOTIVATE THE DOMESTIC AND INTERNATIONAL CONSUMER TO VISIT IRELAND'S ANCIENT EAST.

STRATEGIC INITIATIVES.

1. Undertake a comprehensive audit of all sustainable tourism and eco-tourism businesses in the region.
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. 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).
4. Implement the Environmental Monitoring Programme, as referenced above, to ensure that the effects of tourism on environmental, heritage and cultural assets is monitored to allow for early detection of any possible issues.

STRATEGIC OBJECTIVE 4: ENABLE AND ASSIST THE INDUSTRY TO GROW ITS CAPACITY AND CAPABILITY SO THAT IT CAN THRIVE OVER THE PERIOD OF THIS STRATEGY AND CREATE SUSTAINABLE JOBS IN LOCAL COMMUNITIES.

STRATEGIC INITIATIVES.

1. Promote responsible tourism practices among tourism providers and encourage them to pursue sustainability certification as appropriate.
2. Devise a set of carbon calculators using the carbon reporting framework for tourism businesses and for tourists (these will be provided nationally).
3. Roll out a comprehensive programme of sustainability supports and toolkit (nationally) to industry and host a series of accompanying workshops.
4. 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 as per the Carbon Budget and the Climate Action Plan 2021. We will also support the uptake of sustainability measurement and certification programmes at both enterprise and destination levels.

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

STRATEGIC INITIATIVES.

1. Integrate the principles of regenerative tourism and sustainability actions into all DEDPs, including capability, particularly for communities, at the level of the destination.
2. Promote the Leave No Trace principles to both visitors and tourism providers.
3. Support tourism development in Decarbonisation Zones as differentiators for the visitor.
4. Establish sustainability as a core principle across all aspects of the DEDPs within Ireland's Ancient East.
5. Promote responsible tourism practices among tourism providers and encourage them to pursue sustainability certification as appropriate.
6. 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).
7. When implementing initiatives associated with land and water-based initiatives, it is our objective to ensure the containment and control of Invasive Alien Species (IAS) with accordance with the EC (Birds and Natural Habitats) Regulations, 2011.
8. 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.
9. Implement the Environmental Monitoring Programme, as referenced above, to ensure that the effects of tourism on environmental, heritage and cultural assets is monitored to allow for early detection of any possible issues.
10. Undertake a series of initiatives with a range of stakeholders in accordance with good environmental practice to create new sustainable tourism opportunities.





Johnstown Castle Estate, Museum & Gardens, County Wexford.

4. MEASURING SUCCESS



4.1. MEASURING SUCCESS

The following is a series of desired 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 ANCIENT EAST DESTINATIONS ARE RECOGNIZED BY THE VISITOR, THAT THE BRAND IS COMPELLING TO OUR TARGET MARKET SEGMENTS AND THAT THE EXPERIENCE EXCEEDS THEIR EXPECTATIONS | |
| OUTCOME / KPIs TO 2027 | DATA SOURCE |
| <p>1. The southern half of Ireland's Ancient East has become a destination of choice domestically and internationally.</p> <ul style="list-style-type: none"> • A better balance of leisure / business tourism in Cork. • A product offering which meets visitor expectations in cities. • 5 new / improved attractions of scale generating +150k visitors. • Improved trails network across the landscape with accompanying visitor interpretation showing increased usage. | <p>Key Account Data</p> <ul style="list-style-type: none"> • Year on year growth in key metrics such as consideration, intent and penetration in Fáilte Ireland's Behaviour and Brand Tracker (BBT) and Fáilte Ireland's Survey of Overseas Travellers (SOT). • A bi-annual measurement in Fáilte Ireland's Destination Attitude Survey (DAS). |
| <p>2. The Northern half of Ireland's Ancient East has seen a steady increase in international tourists and now has a strong mix of domestic, NI and international business with:</p> <ul style="list-style-type: none"> • 2 new / improved attractions of scale generating +150k visitors. • Visitors are responding positively to the "Ancient" proposition, underpinned by the UNESCO site and is seen as an international heritage destination. • Improved trails network across the landscape with accompanying visitor interpretation showing increased usage. | <ul style="list-style-type: none"> • Year-on-year growth in key metrics such as consideration, intent and penetration in the BBT and SOT. A bi-annual measurement in Fáilte Ireland's DAS. |
| <p>3. Year-on-year increase in the satisfaction ratings among visitors to the region.</p> | <ul style="list-style-type: none"> • BBT and SOT for annual data, and DAS for bi-annual data on satisfaction metrics. |

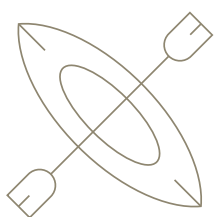
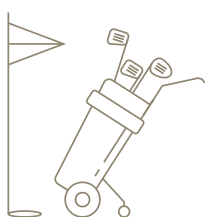
KPIs and metrics will evolve during the life of this RTDS.

VISITOR KPIs

TO ENSURE THAT IRELAND'S ANCIENT EAST DESTINATIONS ARE RECOGNIZED BY THE VISITOR, THAT THE BRAND IS COMPELLING TO OUR TARGET MARKET SEGMENTS AND THAT THE EXPERIENCE EXCEEDS THEIR EXPECTATIONS

| OUTCOME / KPIs TO 2027 | DATA SOURCE |
|---|--|
| <p>4. Year-on-year increase in the levels of awareness, consideration and intent to visit among domestic and overseas visitors.</p> | <ul style="list-style-type: none"> • BBT and Tourism Ireland's GTI survey. |
| <p>5. Visitors find ease of access to high quality information about what there is to see and do in the region prior to visiting.</p> | <ul style="list-style-type: none"> • Fáilte Ireland's DAS and BBT. |
| <p>6. Year-on-year increase in the number of domestic and overseas visitors engaging with the Ireland's Ancient East brand on social media.</p> | <ul style="list-style-type: none"> • Social Media surveys. • Digital agency metrics. |
| <p>7. An increase in the number of repeat visits by domestic holidaymakers.</p> | <ul style="list-style-type: none"> • Year-on-year increase in repeat visits as measured by the BBT. |

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

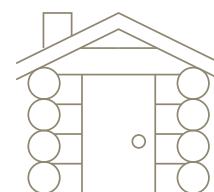
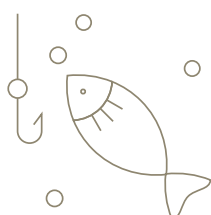


INDUSTRY KPIs

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

| OUTCOME / KPIs TO 2027 | DATA SOURCE |
|---|--|
| <p>1. Tourism revenue into the region has recovered to 2019 levels and has potential to grow an additional 5% by 2026 and is on target to grow steadily by an average of 3% year-on-year thereafter.</p> | <ul style="list-style-type: none"> Fáilte Ireland’s Survey of Overseas Travellers (SOT); Fáilte Ireland estimates of Domestic Visitor Spend. |
| <p>2. Brand adopted and utilized by industry in its sales/marketing activities.</p> | <ul style="list-style-type: none"> Brand proposition review complete with new brand guidelines and industry tool-kits. DEDP KPIs. Year-on-year measurement of increase in fit for purpose businesses. |
| <p>3. Year-on-year increase in the RevPAR of hotel bednights sold in the low season.</p> | <ul style="list-style-type: none"> Key Account Data. |
| <p>4. Year-on-year improvement in the number of industry websites that are well optimized, selling online and have connected distribution.</p> | <ul style="list-style-type: none"> Fáilte Ireland Digital That Delivers Tracking. |
| <p>5. Strong coordinated tourism networks in each DEDP area with enhanced commercial capability.</p> | <ul style="list-style-type: none"> Ireland’s Ancient East Industry Survey. |
| <p>6. The industry’s saleable experiences are achieving year-on-year increases in sales with both domestic and overseas tour operators.</p> | <ul style="list-style-type: none"> DEDP and roadmap KPIs. |

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

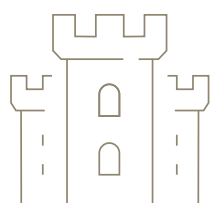


COMMUNITY KPIS

TO ENSURE THAT IRELAND'S ANCIENT EAST DELIVERS BENEFITS TO LOCAL COMMUNITIES AND CONTRIBUTES TO THE REGION BEING A BETTER PLACE IN WHICH TO LIVE AND WORK

| OUTCOME / KPIS TO 2027 | DATA SOURCE |
|--|---|
| <p>1. Year-on-year increase in employment in the sector across the region.</p> | <ul style="list-style-type: none"> Fáilte Ireland data and/or CSO data. |
| <p>2. Communities maintain and/or improve their Tourism Approval Rating, that demonstrate high levels of positive engagement by local communities in Ireland's Ancient East.</p> | <ul style="list-style-type: none"> Fáilte Ireland's Community Survey. |
| <p>3. Key destination towns have increased their attractiveness and appeal as great places to visit and stay. They have a vibrant evening economy bolstered by new attractions, pedestrian prioritisation, thriving urban dining and other public realm developments providing day and night experiences for visitors and residents alike.</p> | <ul style="list-style-type: none"> DAS metrics establishing benchmarks and then year-on-year tracking on an engagement metric. |

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

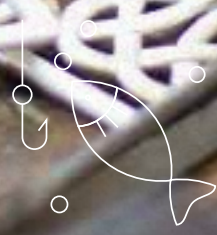
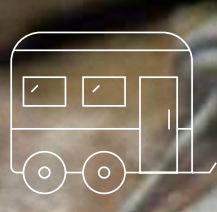
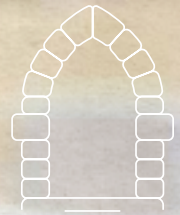
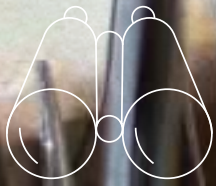


ENVIRONMENT KPIs

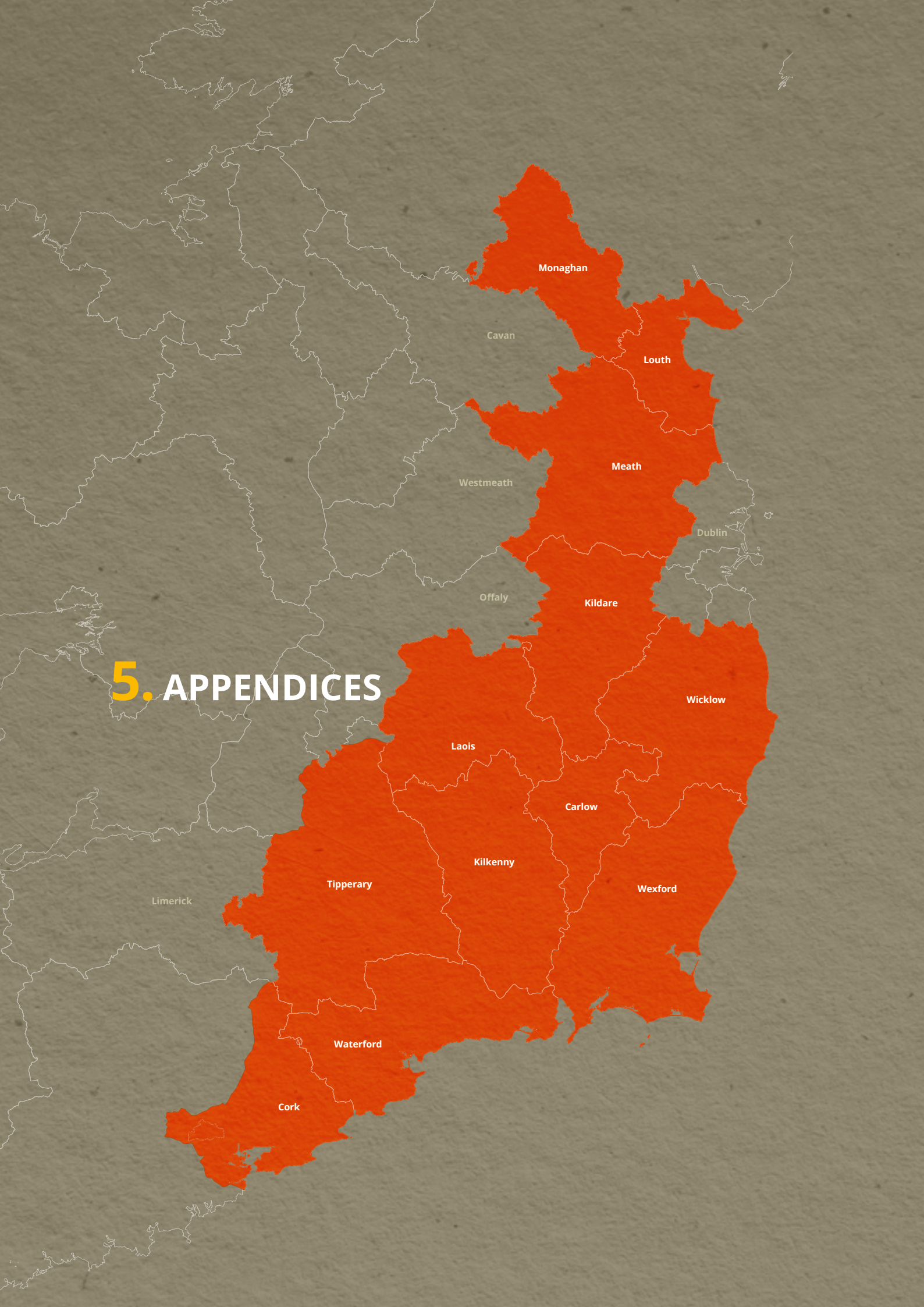
TO ENSURE THAT THIS PLAN FACILITATES THE PROTECTION AND ENHANCEMENT OF THE ENVIRONMENT IN IRELAND'S ANCIENT EAST AS THE FUNDAMENTAL ASSET OF TOURISM IN THE REGION, IN ASSOCIATION WITH OTHER KEY STAKEHOLDERS.

| OUTCOME / KPIs TO 2027 | DATA SOURCE |
|--|--|
| 1. The Ireland's Ancient East Regional Tourism Development Strategy demonstrates full compliance with all relevant requirements arising from EU and Irish planning and environmental legislation. | <ul style="list-style-type: none"> Strategic Environmental Assessment & National Environmental Monitoring Programme 2021-2026. |
| 2. 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. | <ul style="list-style-type: none"> Surveys will be conducted regularly during the lifetime of the strategy to monitor progress of tourism businesses towards this goal. |
| 3. Tourism activities are not contributing to environmental damage or significant losses of habitat or species. | <ul style="list-style-type: none"> Fáilte Ireland's National Environmental Monitoring Programme 2021-2026. |
| 4. The region has significantly developed outdoor assets and infrastructure, enabling visitors to discover the landscape in a sustainable manner. | <ul style="list-style-type: none"> Consumer Sustainability Tracker (CST) which will track sustainability perceptions and engagement. ORIS Scheme. Greenway Interpretation Scheme. |
| 5. Improved provision of public transport links in the region and 'last mile' transport links in partnership with National Transport Authority together with improved e-car charging infrastructure. | <ul style="list-style-type: none"> Data from National Transport Authority. Local Link a strategic part of visitor orientation. |
| 6. Cork has grown its MICE market significantly through the Cork Convention Bureau ranking in the Global Destination Sustainability Index. | <ul style="list-style-type: none"> GDSI ranking. |
| 7. Year-on-year increase in the uptake by industry of sustainability / environmental certification. | <ul style="list-style-type: none"> Certification schemes. |

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



5. APPENDICES



Monaghan

Cavan

Louth

Meath

Westmeath

Dublin

Offaly

Kildare

Wicklow

Laois

Carlow

Kilkenny

Wexford

Limerick

Tipperary

Waterford

Cork

5.1. APPENDICES

APPENDIX A1

NATIONAL & REGIONAL POLICIES

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, Dept 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 Taskforce.

Fáilte Ireland Strategic Plan.

Fáilte Ireland: Tourism Development and Innovation – A Strategy for Investment 2016 – 2022.

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

- *Midlands Regional Enterprise Plan*

- *North-East Regional Enterprise Plan*

- *South-East Regional Enterprise Plan*

OPW/ NPWS

- *Heritage Ireland 2030 (Published Feb 2022).*

Coillte

- *Outdoor Recreation Plan 2017 – 2021.*

- *Coillte Recreation Policy 2016.*

Údarás na Gaeltachta Strategic Plan 2021 – 2025 *Gaeltacht Area Language Plans (LPT).*

LOCAL AUTHORITY DEVELOPMENT PLANS AND TOURISM STRATEGIES

| LOCAL AUTHORITY | DEVELOPMENT PLAN | TOURISM STRATEGY | TRANSPORT STRATEGY |
|--|---|---|--|
| CORK CITY COUNCIL | Cork 2050. Cork City Development Plan 2022 - 2028. | | Draft Cork Metropolitan Area Transport Strategy. |
| CORK COUNTY COUNCIL | Cork 2050. Cork County Development Plan 2022 - 2028. | | Draft Cork Metropolitan Area Transport Strategy. |
| WATERFORD CITY & COUNTY COUNCIL | Waterford City and County Development Plan 2022 - 2028. | | Waterford Metropolitan Area Transport Strategy. |
| TIPPERARY COUNTY COUNCIL | Tipperary County Development Plan 2022 - 2028. | Tipperary Tourism Development Strategy 2016 - 2021. | |
| WEXFORD COUNTY COUNCIL | Wexford County Development Plan 2021 - 2027. | County Wexford Tourism Strategy 2019-2023. | |
| KILKENNY COUNTY COUNCIL | Kilkenny City and County Development Plan 2021 - 2027. | Kilkenny County Council Tourism Statement & Work Programme 2017 - 2022. | |
| CARLOW COUNTY COUNCIL | Carlow County Development Plan. | Carlow Tourism Strategy & Action Plan 2020-2025. | |
| MEATH COUNTY COUNCIL | Meath County Development Plan 2021 - 2027. | Economic and Development Strategy for County Meath 2014 - 2022. | |
| LOUTH COUNTY COUNCIL | Louth County Development Plan 2021 - 2027. | Louth Tourism & Heritage Action Plan 2016 - 2021. | |

| LOCAL AUTHORITY | DEVELOPMENT PLAN | TOURISM STRATEGY | TRANSPORT STRATEGY |
|--------------------------------|---|---|----------------------------------|
| WICKLOW COUNTY COUNCIL | Wicklow County Development Plan 2022 - 2028. | Wicklow Statement of Tourism Strategy & Work Programme 2017 - 2022. | |
| LAOIS COUNTY COUNCIL | Laois County Development Plan 2017 - 2023. | The 2018 - 2023 Laois Tourism Strategy. | |
| KILDARE COUNTY COUNCIL | Kildare County Development Plan 2017 - 2023. | | Kildare Town Transport Strategy. |
| MONAGHAN COUNTY COUNCIL | Monaghan County Development Plan 2019 - 2025. | Monaghan Tourism Strategy 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.

