



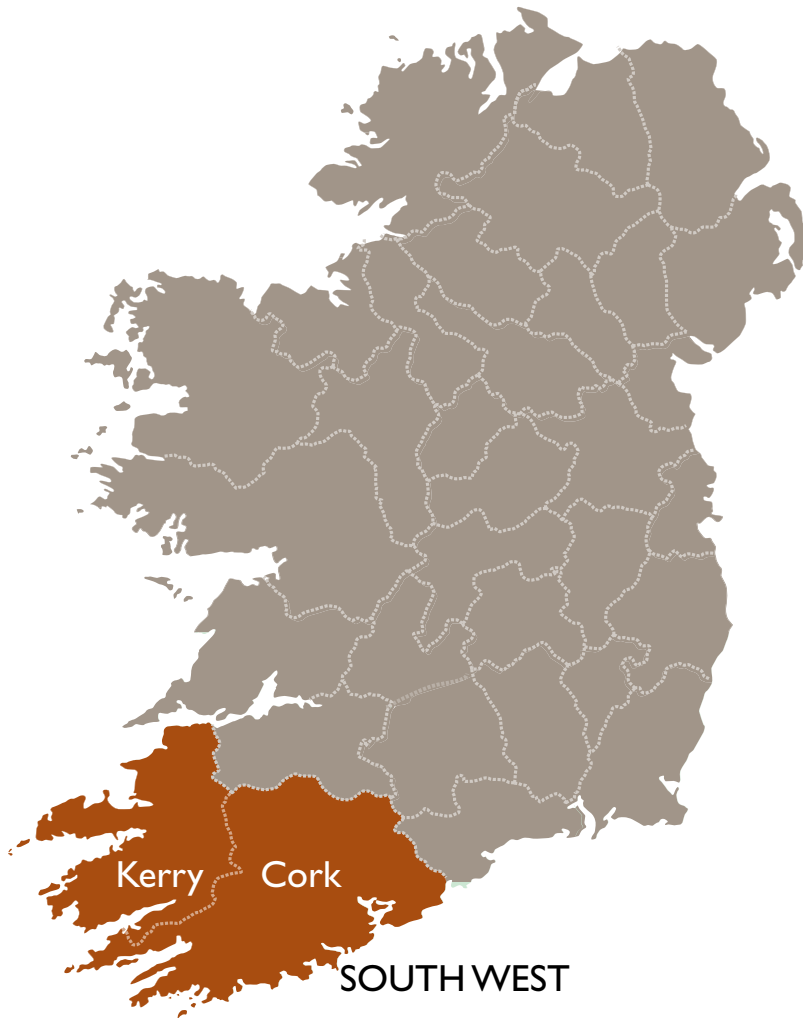
# FÁILTE IRELAND SOUTH WEST

Regional Tourism Development Plan 2008-2010



**Fáilte Ireland**

National Tourism Development Authority



## TARGET

The region's total tourism earnings would aim to be up to €1.4 billion by 2010.

The region aims to attract more than 2.8 million holiday visitors.

# SOUTH WEST TOURISM DEVELOPMENT PLAN 2008-2010

## HEADLINES

### KEY MARKET FOCUS:

- To at least grow tourism in line with market growth in all markets, in face of increasing competition
- To win a larger share of the growing number of Europeans visiting Ireland
- To secure North American traffic and bednights in 'open skies' era
- To attract more domestic short-break and business visitors

### Strategic goals:

1. Build on the region's position as Ireland's leading tourism destination outside of Dublin, by focusing on innovative developments and marketing while delivering top quality experiences based on the region's natural and cultural assets and well-established range of leisure and business tourism facilities.

#### Specifically:

- Deliver high quality nature-based holiday experiences integrating wellness with adventure and related activities 'Nature and Nurture', based around established tourism service centres in counties Kerry and Cork
  - Position the City of Cork as a principal gateway to the region and as a major urban destination for business and leisure visitors
  - Exploit the maritime heritage and indigenous strengths of the region's coastal environs
  - Capitalise on the tourism potential of country pursuits and the cultural and linguistic heritage of the rural areas of Cork and Kerry
2. Improve transportation links to and within the region

### Achieving these goals:

- Fáilte Ireland South West, working with all stakeholders, will heavily promote the region's total range of motivations to visit and market themed holidays
- Fáilte Ireland South West will work closely with local authorities, state agencies, LEADER companies, businesses, and local groups to bring about change
- Fáilte Ireland South West is committed to providing leadership, advocacy and facilitation as well as delivering marketing, business development and training services to the industry

### IMPROVING THE VISITOR EXPERIENCE:

- Extend the South West Adventure hub projects
- Promote the development of two strategically located Adventure Centres
- Develop a South West Coastal Walking Route and identify new walking routes in the region
- Expand calendar of Festivals and Events and encourage the development of two attractor events in the South West
- Develop new all-weather family attractions in the South West
- Develop the potential for Cruise ships to dock and tender in the South West
- Develop the heritage and cultural assets of the South West (Castles, Houses, Gardens, Trails etc)
- Develop Kerry's 'Christian/Pre-Christian' story
- Work to achieve UNESCO World Heritage Status for the first transatlantic cable on Valentia Island
- Ensure the sustained growth of Killarney and Ring of Kerry as a primary tourism hub with particular emphasis on the county's carrying capacity
- Develop a major attraction to celebrate and stage natural culture
- Develop North Kerry (especially Listowel, Great Blasket and Gaeltacht) as leading Irish literary and folklore destinations outside of Dublin
- Develop Cork as a principal gateway for the region and as a major business and leisure tourism destination.
- Integrate the development of regional business tourism, including existing and new developments in Kerry, particularly in the catchments of Killarney, Kenmare and Tralee. Explore the potential for a Kerry Convention Bureau.
- Develop new visitor entertainment facilities in Cork City
- Promote the development of Cork's Inner and Outer harbours and explore the potential to develop tourism facilities in Cork's City Quays
- Explore the potential of development of a necklace of marinas stretching along the coastline and a cluster of 'Centres of Excellence' in sailing
- Work to develop the concept of 'Culinary Cork'
- Develop the Blackwater and Lee valleys as inland propositions for country pursuits
- Work to secure new air services to Cork and Kerry airports
- Develop key attractors in and around Cork City
- Exploit potential of improved rail and bus services
- Explore potential of new Film Commission in the region
- Secure better signposting and interpretation

# SOUTH WEST TOURISM DEVELOPMENT PLAN 2008-2010

## MORE AGGRESSIVE MARKETING:

- Year round Discover Ireland campaigns for short breaks, events and themed holidays
- Active overseas destination and product marketing campaigns, including expanded publicity, for the region with Tourism Ireland, in Britain, Europe and North America
- A new and improved website with more aggressive online marketing
- A strong focus on a business tourism campaign
- Aggressive promotion with carriers of new and existing access routes
- Better cross-selling of activities, attractions, events within the region

## SUPPORT FOR BUSINESSES AND ENTERPRISES:

In addition to the range of training and business development services Fáilte Ireland South West, through its new Business Development Manager, can make available:

- Customised business diagnostic and advisory services
- Best practice guidance
- Custom-designed management and staff development programmes
- Innovation support

## TOURIST INFORMATION:

- A new Discover Ireland Centre will open in Killarney in 2008, followed by Cork City. This will be linked to the redesign of the Tourist Information Office network, giving the visitor easier access to information
- Exploit the use of new communication technologies for visitor use
- Develop visitor servicing initiatives in collaboration with the industry

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Following the recent reorganisation of regional tourism structures, Fáilte Ireland South West, as part of the National Tourism Development Authority, is charged with delivering increased tourism benefits to the counties of Cork and Kerry. The purpose of the reorganisation was to increase effective local delivery of key tourism objectives, as envisaged in the National Development Plan and Fáilte Ireland's Product Development Strategy.

To ensure the success of this realignment of role, functions and structures of regional tourism, Fáilte Ireland South West has, in conjunction with stakeholders in the region, prepared the South West Tourism Plan 2008-2010.

The plan is intended to provide a road map so that all the key players from both the public and private sectors can most effectively contribute to the further development of sustainable and economically beneficial tourism in the region.

The strategies and implementation proposals engage both national and local authorities and other public sector agencies working in tandem with the local business and community interests to achieve the targets set for tourism in the region.

The process of developing the plan has been very comprehensive. It has included wide-ranging inputs from stakeholders and partners in the public, private and community sectors. TTC - Tourism and Transport Consult facilitated and guided the process along with Fáilte Ireland South West.

This plan presents a series of regional strategic goals which are intended to define the priorities for product and service development, destination marketing, and enterprise development.

The South West Regional Tourism Plan 2008-2010 focuses on:

- Strategic decisions on planning and investment in regional attractions and infrastructure to ensure the best regional outcome
- Clearer direction for all stakeholders together with clarifying roles of various local and central government agencies in supporting regional tourism, thereby aiding decisions on resourcing and regulating tourism projects
- Clear prioritisation of regional marketing propositions – priority appeals and market match in both the home and overseas markets
- Closer alignment of the services of Fáilte Ireland to the needs of the industry at local level, resulting in operational efficiencies, more effective investment of public funding and making it easier for tourism operators to access relevant support

This regional strategy is consistent with Ireland's national strategy but has strong regional ownership and a set of practical interventions and projects designed to grow the value gained from tourism and to limit potential negative impacts of tourism in the region.

Fáilte Ireland South West has sought to secure clear tourism policy statements in all local and regional government statutory plans which put tourism in perspective in terms of its relative importance as an economic driver and contributor to other community outcomes.

The overall aim is to provide the necessary tourism infrastructure and services within the region in order to:

- Sustain tourism revenue into the local economy
- Help businesses and employment in the hospitality sector to grow
- Project a better appeal
- Deliver a better visitor experience

While the opportunities are good, the scale of the challenges should not be underestimated.

This plan will guide the marketing campaigns, product development priorities and enterprise support programmes in the region to ensure sustainable growth for the business and resident communities of the region.



01

## Tourism in the South West - What's been happening?

Gougane Barra (Gugán Barra), Co. Cork

## 1.1 CURRENT TOURISM DEMAND

Cork/Kerry, as Ireland's top tourism region, successfully attracts a balanced mix of domestic and overseas visitors and has a well-established tourism industry and tradition of hospitality.

A total of €1,233m was spent by 3.6 million visitors in the region in 2006, having increased in current terms by an average of 10.6% per annum since 2001. The total number of visitor bednights in the region in 2006 was estimated at 19.5 million, with overseas visitors accounting for two in every three. Overseas visitors spent €887m or 72% share of the total, with a further €340m spent by domestic visitors.

The region hosted almost 2.4 million holiday visitors last year, 1.37 million from overseas and 1 million Irish. The British market is the most important, accounting for 500,000, followed by mainland Europeans 400,000 and almost 350,000 North Americans. Over the past six years the region has gained market share of holiday visitors to Ireland from Britain and new long-haul markets, while the region's share of the other main source markets (EU and North America) has slipped.

Fig 1.1: Holidaymakers to the South West 2000-2006 (000s)

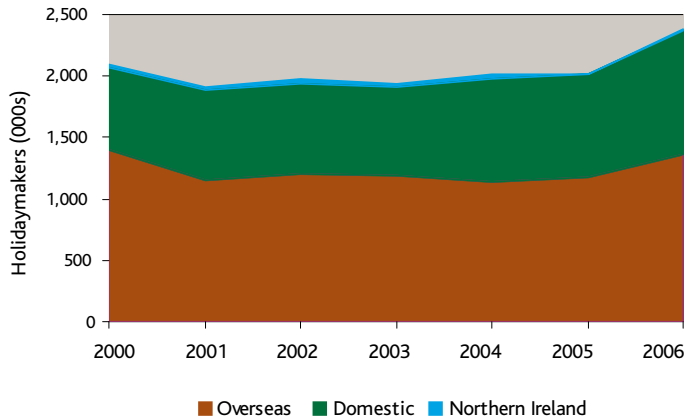
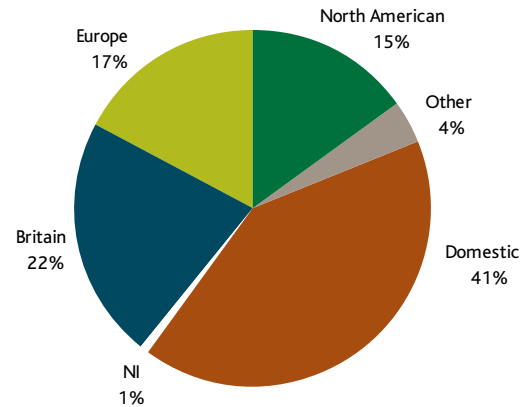


Fig 1.2: Origin of Holidaymakers to the South West 2006



## 1.2 REASONS TO VISIT

While the appeals and motivations of visitors to the region are complex and differ by nationality, age and interests, the top 'reasons to visit' include: the majestic scenery of Killarney and the Ring of Kerry; Blarney Castle; West Cork; the Atlantic coast, bays and islands; golf; sailing; and Dingle.

Reason to visit	Comment
<b>Ring of Kerry and Lakes of Killarney</b>	One of the best known destinations in the country, with particularly high recognition in the US market. The scenic beauty of the area makes it a 'must' on itineraries. The area has a long-established tourism base to service visitors and is attracting an increasing share of the domestic market.
<b>Atlantic coast and bays</b>	The name and the image capture the imagination of potential and actual visitors. Wild Ireland, remote Ireland and real Ireland provide the basis of the perception. Open roads, unspoilt culture and countryside drive the desire for the experience.
<b>The Blarney Stone</b>	Another 'must-do' attractor, especially for visitors from the long-haul markets
<b>The 'unique' West Cork experience</b>	The appeal, scenery and ambiance of West Cork delivers a unique visitor experience, catering to based and touring visitors. The area is rich in land and water-based activities and is a showcase for good Irish food including Kinsale as the gourmet capital of Ireland.
<b>Golf</b>	World renowned links and signature courses are the primary motivation for an important share of the golfing market to and within Ireland.
<b>Sailing and marine-based activities</b>	The strong international sailing connections of the area together with its maritime heritage, Cork Harbour, the West Cork and West Kerry coastlines and islands are strong motivators to visit.
<b>Festivals and events</b>	The region boasts a number of festivals attracting overseas and domestic visitors, including Cork Jazz; Cork Film; Rose of Tralee; Kinsale Gourmet; and Listowel's Writers' Week.
<b>Cork as a business hub</b>	Tourism in the city is underpinned by an established and expanding business hub, including indigenous and FDI enterprises and its position as the major regional administrative centre.

### 1.3 FORCES FOR CHANGE

Recent trends and developments in leisure travel indicate a number of factors which are expected to influence demand, supply and distribution of the tourism experience in the short-to medium-term future. These include changing customer profiles, needs and expectations; increasing competition; changes in how people plan and purchase travel; changes within the airline and travel industries; and a growing environmental consciousness.

Additionally there are a number of social, economic and environmental factors impacting the quality and depth of the Ireland holiday experience.

### 1.4 PRODUCT AUDIT AND SWOT ANALYSIS

Outside of Dublin counties' Kerry and Cork have the greatest inventory of tourism plant in the country – combined they account for 20% of the country's capacity. Outside of Dublin the region dominates across most tourism product categories. Killarney is the single largest accommodation bank outside of the capital.

Overall Kerry is rated top across all product categories in quality. It is one of only seven counties which scores above the national average. Cork is rated in the country's top grouping, primarily due to the concentration of quality products close to the coast, especially West Cork.

A SWOT analysis indicates that the South West has an excellent location and product base and a partially addressable list of weaknesses. There are significant opportunities for product development and improvement in the quantity, quality and cohesion of the South West's overall regional offer. Key concerns relate to environmental issues such as carrying capacity around the Ring of Kerry as well as current and future access issues by land, air and sea.

Table 102: SWOT Analysis

Strengths	Weaknesses
<b>Strong international image and awareness including Ring of Kerry, Dingle, Blarney, West Cork</b>	Coastal access
<b>Strong position in the organised tour market</b>	Countryside access
<b>Cork City and Killarney are major accommodation hubs</b>	Signposting
<b>Killarney National Park and Fota Wildlife Park</b>	Rural road infrastructure
<b>Marine tourism/sailing/maritime heritage/islands</b>	Road access, especially for Kerry
<b>Health and wellness offering</b>	Weak positioning of Cork City as an urban tourism destination
<b>Established 'Fuchsia' brand</b>	Quality issues regarding some accommodation and services
<b>Accommodation, restaurants, food and services</b>	Limited European air services to Cork
<b>Golf</b>	Limited visitor entertainment on offer in Cork City, especially Irish music and dance
<b>Heritage towns and festivals</b>	Severe lack of family facilities, particularly all-weather facilities
<b>Cruise handling capability in Cork harbour</b>	Poor product integration and cross-selling
<b>Good access to Cork by car, rail and road</b>	Fragmented product provision
<b>A tourism 'mind set' within the region</b>	Insufficient number of internationally recognised festivals
<b>Good 'buy-in' from key stakeholders</b>	Limited online presence and bookability

Opportunities	Threats
<b>Cork City as an urban destination</b>	Environmental degradation
<b>Entertainment – visitor focused</b>	Traffic congestion and visitor overload
<b>Coast – marinas, slipways, beach management and coastal walking routes</b>	Danger of 'dated appeal' of Kerry experience
<b>Angling and water-based activities</b>	Countryside access issues
<b>'Adventure' and nature-based leisure</b>	Dilution of authenticity and welcome
<b>Arts, culture and literary heritage</b>	'Open skies' and removal of Shannon stop
<b>Health and wellness development</b>	Permanent withdrawal of Cork-Swansea ferry
<b>Business tourism and conferences</b>	
<b>Food/farmers' markets</b>	
<b>'All-weather' family facilities</b>	
<b>Kerry eco-tourism and Geopark</b>	

02

Shaping the Future



## 2.1 THE VISION FOR IRISH TOURISM

The core strategic goals for Irish tourism, as set out in the National Tourism Development Strategy 2007-2013, focus on achieving value growth based on a quality natural environment, good accommodation, attractors including culture to entice visitors and deliver authentic experiences, and by attracting investors, high quality staff and innovators.

## 2.2 VISION FOR THE SOUTH WEST

*“The South West further secures its position as Ireland’s premier tourism region”*

## 2.3 KEY SOUTH WEST REGIONAL STRATEGIC GOALS 2008-2010

Based on our future vision for tourism, the following strategic goals address recent performance trends and competitive advantages as developed from detailed analysis and stakeholder objectives.

### KEY SOUTH WEST REGIONAL STRATEGIC GOALS

1. Build on the region’s position as Ireland’s leading tourism destination outside of Dublin, by focusing on innovative developments and marketing while delivering top quality experiences based on the region’s natural and cultural assets and well-established range of leisure and business tourism facilities.
  - Develop and deliver high quality nature-based holiday experiences, integrating wellness with adventure and related activities (‘Nature and Nurture’), based around established tourism service centres in counties Kerry and Cork.
  - Position the City of Cork as a principal gateway to the region and as a major urban destination for business and leisure visitors.
  - Exploit the maritime heritage and indigenous strengths of the region’s coastal environs.
  - Capitalise on the potential of country pursuits and the cultural and linguistic heritage of the rural areas of Cork and Kerry.
2. Improve transportation links to and within the region.

## 2.4 GUIDING PRINCIPLES

In the process of achieving these goals the following guiding principles will be key to success:

- Protect Ireland's principal strengths – its people, the natural environment, and sense of place
- Focus on quality and economic value
- Develop attractors which fill a gap for a defined market demand
- Spread benefits around the region where this meets market needs and has community support
- Assist in the development of the rural SME accommodation sector, primarily B&Bs; self catering; caravan and camping; guesthouse and farmhouse accommodation and hostels
- Develop facilities that benefit residents and visitors alike
- Work closely with public authorities, agencies and other stakeholders to achieve objectives.

The goals will be achieved by pursuing a set of strategies and programmes of actions in product development, marketing and business supports. Fáilte Ireland South West will work with and facilitate public and private sector partners and other stakeholders to achieve the goals set out in this plan. However, at this stage the level and source of investments have yet to be determined. The key to success in securing investment will centre on sustainable project proposals which are market focused.

Fáilte Ireland's recently launched Environmental Action Plan 2007-2009 is intended to ***'advocate a high quality physical environment for tourism and to promote good environmental practice throughout the tourism sector'***.

The environment is core to Ireland's tourism with:

- 80% of visitors rating Ireland's scenery as an important reason for visiting Ireland
- 74% attracted by the natural unspoilt environment
- 58% citing Ireland's attractive cities and towns (Visitor Survey 2006/Fáilte Ireland).

The basic tenet of Fáilte Ireland's policy on the environment is that:

***'In the long term, our environmental image as a destination will only be ensured by our success in protecting the quality of the environment'***.

The Environmental Action Plan sets out five key objectives:

1. To place environmental issues at the core of sustainable tourism policy at national, regional and local levels.
2. To advocate for the protection of key environmental and tourism assets.
3. To undertake research leading to a clearer understanding of the relationship between tourism and the environment.
4. To promote good environmental practice within the tourism sector and to advise on the development of ecotourism.
5. To establish a number of strategic partnerships in implementing this plan.

**Fáilte Ireland South West is committed to pursuing these objectives throughout the region.**



03

## Addressing the Opportunities and Challenges

Macgillycuddy Reeks, Co. Kerry

### 3.1 BUILD ON THE REGION'S POSITION AS IRELAND'S LEADING TOURISM DESTINATION OUTSIDE DUBLIN

Within the overall goal of "Building on the region's position as Ireland's leading tourism destination outside of Dublin, by focusing on innovative developments and marketing while delivering top quality experiences based on the region's natural and cultural assets and well-established range of leisure and business tourism facilities," the following specific goals are proposed.

#### **3.1.1 Develop and deliver high quality nature-based holiday experiences integrating wellness with adventure and related activities ('Nature and Nurture'), based around established tourism service centres.**

##### Rationale

The rationale behind this goal is to develop and fully exploit the natural landscape, culture and heritage attributes of the South West region and its strengths as an established tourism destination. The diversity of landscape and depth of heritage connects the counties, creating a varied and compelling visitor experience.

The main area of focus will be on developing and marketing the South West as an activities destination – linking leisure with adventure and wellness. Related to this is the integration of key walking routes of Cork and Kerry, particularly themed and iconic routes and the possibility of creating a South West Coastal Walking Route.

The second strand is the integration and marketing of Heritage Trails which span both counties (e.g. Film Trails).

The third and fourth strands include the identification and development of opportunities to develop further all-weather family attractions/activities and major festivals and sporting events, capable of attracting overseas visitors to the region and showcasing the region's strengths.

A fifth element is that of 'nature and heritage', both are critical to Cork and Kerry. The plan envisages developing the theme of 'Castles, Houses and Gardens of the South West' as well as exploiting the uniqueness of the South West's Tropical Gardens, encompassing Glengarriff/Garnish Island and Kenmare etc.

Finally Business Tourism presents new high yield opportunities for the region working with regional convention bureaus and capitalizing upon new event centre developments and linked hubs; primarily focusing on the dominant urban destinations of Cork City and Killarney.

##### Opportunities

The main opportunities are to develop an integrated approach to marketing the South West region as the country's leading visitor destination, particularly to an overseas audience, whilst still allowing for an underlying uniqueness in the positioning of Cork and Kerry to capitalise on the core strengths of each county. An increased focus on visitor involvement with the region's natural assets, heralding a gradual move away from the current high-dependence on short-stay coach and car-touring visitors. The strategy will also encourage the

development of a wider spread of tourism services providing additional economic benefit to communities throughout the region. In addition to the leisure tourism opportunities the facilities for meetings and conferences in Kerry present a real opportunity for continued growth in high yield discretionary business tourism, particularly as Dublin loses some of its hotel based meeting spaces.

### Strategic fit with markets

The approach undertaken is compliant with the overall regional strategy of boosting visitor numbers, length of stay and revenue from both overseas and domestic markets.

The current key international market segments of coach and car-borne touring visitors are demonstrably vulnerable both to changing market trends and to environmental and current cost pressures. The envisaged repositioning towards authentic natural and heritage-based experiences reflects known market changes – the move to experiential rather than passive tourism as well as exploiting the potential for 'stay longer – spend more' visitors. The strategy aims to target this high-yield sector with a range of relevant activities and attractions (things to do and things to see), all of which strive to achieve excellence in quality.

Presenting an holistic, transparent approach to marketing Cork and Kerry will encourage touring and the promotion of rural tourism.

At the same time, allowing for 'key USPs' associated with each county will communicate a clear destination message, based around the experience of 'what there is to do and see' in each county. This is also important, as both counties are significant propositions in their own right, particularly in the domestic mindset.

### Challenges and risks

The most significant challenge in relation to this market repositioning will be the need to sustain existing visitor traffic volumes, especially in Kerry, at the same time as developing new visitor offers and facilities. Too rapid a repositioning of the offer could have a negative impact on traditional visitor flows and would be pointless to attempt without local industry support.

The second main challenge is to promoting a collaborative approach to the development and marketing of the region by cross-county public and private sector bodies, while also allowing for the uniqueness of each county. It is envisaged that such an approach can be successfully adopted by Fáilte Ireland South West assuming the lead in encouraging communications and collaboration.

Other challenges include the need to ensure the economic and financial viability of proposed new developments, especially those at the more individual end of the market. Fáilte Ireland's Enterprise Development division can make a constructive contribution to mitigating this risk.

### 3.1.2 Position the City of Cork as a principal gateway to the region and as a major urban destination for business and leisure visitors

#### Rationale

The City of Cork enjoys a unique combination of built and natural assets which have significant under-exploited potential in tourism terms. Fáilte Ireland South West's key public and private sector partners are already making significant steps towards addressing this situation – the new Cork City Convention Centre development being just one example. A co-ordinated approach to development, marketing and enterprise support offers excellent potential both to expand the local offer and to reach out to key high-value market segments. Recent and planned improvements in road, rail and air access are also positive.

The proposed approach will be threefold with the first strand being to reinforce Cork City's strong position as a business and leisure hub. Particular emphasis will be given to the Business Tourism sector and improvements in service and entertainment offering to both business and leisure visitors as a preparatory step to ensure that the necessary facilities and services are fit for purpose in line with the development of Cork's first Convention Centre.

The second strand reflects Cork's extensive maritime assets, in particular Cork's Inner Harbour and the Cork City Quays with proposed developments linked to the Gateway Innovation Fund.

The third aspect is primarily focused on one of Cork's most appealing assets, its high quality local food, cuisine and historic drinks industry. Cork and its environs have a strong reputation in this area, spanning from West Cork and Kinsale to Midleton and Shanagarry, including Cork City's English Market and Butter Museum.

#### Opportunities

All the three key strands described above are focused on maximising the economic and social value of Cork's currently under-exploited natural assets. The development of the Cork City Convention Centre will in itself be a major catalyst as will the very substantial current expansion of the City's retail base. Longer term plans for the development of the City's docklands and the possibility of developing Cork's City Quays and Inner Harbour for leisure tourism alongside related opportunities to capitalise upon Cork Harbour's assets such as Spike Island, Haulbowline and the Harbour Forts can only be assisted by increased visitor flows and economic activity.

#### Strategic fit with markets

Each of the three strands has a strong rationale in terms of its good strategic fit with known market segments. In relation to business tourism, this is not only a high value segment but is also one which is an extremely good match in capacity and occupancy terms with the short-break leisure market, both domestic and international.

The focus on 'Culinary Cork' is an excellent match with key high-spending domestic and international discretionary travellers. The presence of high quality cuisine and strong food and drink traditions are known attractors, not just in the context of leisure visitors but also represent important assets in terms of business tourism.

### Challenges and risks

The major challenge facing Fáilte Ireland South West in the implementation of this strategic goal is the extent of the work necessary to achieve it. This is explicitly acknowledged by Fáilte Ireland South West which sees a close working partnership with local authorities and other stakeholders as being critical to success. As in-house resources, both financial and staff, are constrained, strong and constructive partnerships and working arrangements with other funding bodies and implementers will be necessary to achieve success, otherwise there is a serious risk of 'falling between stools'.

The skills issue is also of concern, in terms of: establishing new destination management; expanding services and facilities for business tourism; upskilling and improving local restaurants; together with the viability of new rural and coastal tourism services and centres. In all of these Fáilte Ireland's Enterprise Development Division has the potential to play a constructive role.

### 3.1.3 Exploit the maritime heritage and indigenous strengths of the region's coastal environs

#### Rationale

As with 3.1.2 above in relation to Cork City, the long maritime heritage of coastal Cork and the indigenous strengths of its environs is a major asset to the region. From Youghal in the east to the Kerry Border, the mix of coastline, landscape and built facilities, together with the strong reputation of Kinsale and the Fuchsia brand in West Cork, provide an excellent basis for planned developments, significantly enhanced by its exciting and growing culinary tradition. Coastline and rural development will be closely co-ordinated with similar initiatives in Kerry, stretching from Kenmare to Knightstown and the Shannon estuary, again providing the opportunity for significant positive economic impact in rural areas.

#### Opportunities

There is obvious capacity for extensive coastal development involving marinas, new and improved sailing centres, a coastal walking route and enhanced marketing and promotion of new 'adventure' offerings across Cork and Kerry. Improved exploitation of local artisan produce and quality cuisine (e.g. West Cork's 'Fuchsia' brand) has massive potential, both in enhancing the Cork image and as a major attractor in its own right. Finally, Cork Outer Harbour is widely recognised as having enormous potential for positive development, with significant tourism-related potential.

### Strategic fit with markets

The maritime focus has a close match with important domestic and international segments and the potential development of Cork's Inner and Outer Harbour for leisure purposes would open up many new market opportunities, closely linked with the planned expansion of high value and high spending visitor traffic to Cork City.

### Challenges and risks

As with other strategies, a key challenge is the need to ensure the economic and financial viability of proposed new developments, especially those at the more individual end of the market.

Existing collaborative arrangements as well as Fáilte Ireland's Enterprise Development division can make a constructive contribution to mitigating this risk.

While the potential for Cork Outer Harbour development is widely agreed, the complex web of stakeholders, many of whom have conflicting interests, is likely to be a major obstacle to rapid and effective development. Fáilte Ireland South West's role, at least initially, will be one of advocacy.

### 3.1.4 Capture the cultural, linguistic and country pursuits opportunities throughout the rural areas of Cork and Kerry

#### Rationale

The rural areas of the region have a significant accommodation base, primarily consisting of small-scale and scattered suppliers, widely distributed. Without specific 'draws' whether activity-based or heritage-based, they lack both individual and collective marketing impact. Developing specific product offers suited to the region's extensive rural and cultural and literary strengths will overcome this deficit and strengthen the rural economy, improve regional spread and support the region's accommodation base.

#### Opportunities

A key opportunity is the potential for developing the inland valleys of the Blackwater and Lee which will be addressed with plans for new freshwater angling and nature-based attractors, including walking, cycling and equestrian routes. Linked to this is the opportunity to bundle country pursuit and activity products with accommodation offers, presenting these to customers as part of an attractive regional offer.

The cultural, folklore and literary strengths of the rural areas, in particular areas of North Kerry and North Cork and the Gaeltacht and islands, also provide significant opportunities to develop a more coherent product offer, in this case appealing to a different but nonetheless important market segment.

## Strategic fit with markets

As noted elsewhere there is a move away from passive holiday taking to a more active participatory and experiential approach by both domestic and overseas visitors. The planned initiatives also fit well with the improved search and selection processes now offered by online services of all kinds and which enable a degree of self-packaging to be achieved, especially important in the inbound market. Country pursuits also appeal to the more affluent market segments, this improving visitor revenues and enterprise profitability.

## Challenges and risks

Ensuring appropriate and indeed improving accommodation quality levels is likely to be a challenge, especially in the context of attracting higher spending visitors. Similarly, the short to medium-term economic viability of new country pursuit and activity product offers is likely to be fragile in some instances and will need careful monitoring as well as effective marketing.

## 3.2 IMPROVE TRANSPORTATION LINKS TO AND WITHIN THE REGION

### Rationale

Access is a vital element of tourism success, whether it is by air, rail, road or sea. Cork is strongly positioned with its new airport terminal, harbour, recently improved rail access from Dublin and the planned completion to full motorway standard by 2010 of the M/N8 Dublin Cork route. Kerry has a more fragile status, with road access from Dublin regarded as being poor and a significant disincentive to attracting touring visitors using rental cars. Local roads are often poor and there are carrying capacity issues in the Ring of Kerry.

Access from Cork to Killarney and Tralee is also an issue with an urgent need to upgrade the N22 and recognise the designation of the Killarney-Tralee linked hub under the National Spatial Strategy. Kerry Airport is under-used and transport links from the airport need to be improved. Developments at Shannon, in particular the Open Skies policy, are a significant threat. While rail access has recently improved the new trains are not visitor friendly with little space for luggage or bicycles. Local transportation remains restricted and suffers from a lack of co-ordination, especially in relation to visitor flows, while a common issue across the region, as elsewhere in the country, is the poor quality and inconsistency of signposting.

### Opportunities

Improved air access to Cork Airport, especially from continental European countries, would provide the potential for enhanced short-break and convention traffic, linked to high value attractors such as a culinary Cork focus, as well as for additional longer stay visitors responding to the improved products on offer in both counties. Cork Harbour itself, despite the loss of the Swansea car ferry route in 2007, has considerable potential to expand its ferry and cruise business, and for which the range of ground services required will be a good match to those required for the Cork Convention Centre.

The Cork Area Strategic Plan (CASP) and North and West Strategy include significant support for local public transport while establishing viable rural public transport services which should be facilitated by the Rural Transport Initiative. Similarly, further investment and continued PSO support for connecting services at Kerry Airport is envisaged. Improving directional signposting is an issue of national importance.

### Strategic fit with markets

An expansion of air access to Cork Airport, whether from the UK or from near continental countries, is a close fit to key markets for the region, covering not only business travellers but also independent short-break and longer-stay visitors using hire cars, affinity and special interest groups and event attendees.

Dublin is an important gateway to the region and the improved road and rail access from Dublin will match similar segments to those described above, including North American visitors who will increasingly arrive into Dublin airport. The withdrawal of the Swansea car ferry service in 2007 matches the decline in own-car touring visitors which is partially being substituted by those using rental cars and perhaps by Rosslare arrivals.

### Challenges and risks

Several key challenges exist here, most of which cannot be influenced directly by Fáilte Ireland South West. New route opportunities to Cork and Kerry Airports warrant careful evaluation in association with a range of stakeholders to secure sustainable additional services.

Rail, in particular the suitability of rolling stock for tourism use and the conflicting priorities between leisure visitors and weekly commuters, with a lack of capacity at the beginning and end of each week and at holiday periods, is a serious issue and one which also conflicts with the 'green agenda'. Local public transport development is a national issue, but one where increased visitor usage should enhance route viability in specific instances, thus benefiting both visitors and residents alike.

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What needs to change?  
What actions?



## 4.1 A PARTNERSHIP APPROACH

This strategy focuses on a range of activities necessary to deliver tourism growth in the South West. Fáilte Ireland South West is committed to providing leadership, advocacy facilitation as well as delivery through key functions including product development, marketing, business development and visitor servicing. Only by integrating these elements of the tourism industry will an efficient and effective delivery of an outstanding experience come through.

Fáilte Ireland South West will be a facilitator in the field of product development, maximising the opportunities available for growth, act as a catalyst and as a proponent of new development. It will rely, however, on many partners and will not itself be a developer. The Strategy therefore has an indicative element within it, particularly for major new developments, which the organisation will champion and bring to life.

Fáilte Ireland South West will work closely with all local agencies to co-ordinate an integrated approach to tourism development in the region.

The key implementing and funding partners will be as follows:

### **Local authorities**

In terms primarily of:

- Tourism infrastructure
- Public amenities
- Local Authority operated visitor attractions
- Development planning
- Signposting and roads
- Coastal resorts and beach management.

### **LEADER companies**

In terms primarily of:

- Community tourism initiatives
- SME support funding
- Marketing integration.

### **County and City Development Boards**

They will be key partners with respect to the communication and delivery of a co-ordinated regional strategy at local level. Implementation of the regional tourism strategy objectives will take account also of individual Local Authority Development Plans for:

- Tourism
- Recreation
- The protection and conservation of the environment and the arts.

### **Business and Tourism Enterprise**

By way of:

- Support for business development
- Human resource development
- Marketing
- Quality delivery.

### **State Agencies (including OPW, Coillte etc.)**

In developing quality tourism experiences.

## 4.2 KEY ACTIONS TO REACH GOALS

South West	
▶	Sustain the South West region as the leading tourism destination in Ireland
•	Ensure the sustained growth of Killarney and Ring of Kerry as a primary hub.
•	Work actively to improve air access to both Cork and Killarney and to maintain sea access via Cork.
•	Encourage the development of new all-weather family attractions.
•	Promote the development of new or existing major festivals.
•	Establish potential to harness major sporting events, capable of showcasing the region's strengths.
▶	Develop nature-based holiday experiences
•	Develop and market South West coastal walking routes.
•	Develop and market the activities and adventure proposition in the South West.
•	Position Kerry as a leading destination for nature-based leisure activities.
•	Develop Geopark, Tropical Environment and Gardens, an iconic attraction to celebrate and stage Natural Culture.
•	Develop and implement an 'Eco-friendly Charter'.
•	Increase marketing and cross-marketing of the region's existing nature-based outdoor activities, adventure and scenery.
•	Develop two or three 'specialist' and 'spiritual' wellness centres.
▶	Cork City as a principal gateway and key urban destination
•	Aggressively approach the development of the business tourism sector in association with Cork Convention Bureau and Kerry trade, ensuring that all necessary facilities are fit for purpose.
•	Encourage the development of a cultural central city-shopping experience.
•	Tales of Cork – develop a strategy to communicate and animate local stories of interest.
•	Develop two major city-based festivals.
•	Identify and promote entertainment developments.
•	Invest in the development of existing and new key day-trip attractors close to Cork City (Blarney, Midleton, Cobh, Kinsale).
•	Improve the transport system for day-trips from Cork City to key attractors.
▶	Exploit the maritime heritage and indigenous strengths of coastal Cork and its environs
•	Promote the development of a necklace of marinas.
•	Develop boat-touring along the coastline.

- Encourage a cluster of four or five sailing 'Centres of Excellence'.
- Promote the development of Cork Harbour and the tourism potential of Spike Island.
- Develop two strategically located Adventure Centres.
- Develop three or four 'Centres of Excellence' in sea-angling.
- Work to develop the concept of 'Culinary Cork'.
- Develop a strong seafood culture.
- Capitalise upon the 'Clonakilty District Rural Tourism Destination of Excellence 2007' status.

▶ Capitalise on the developmental and marketing opportunities of the rural areas of Cork and Kerry and their cultural and linguistic heritage

- Develop the tourism potential of the Blackwater and Lee valleys with special focus on angling.
- Expand the bundling and cross-selling of activities with the accommodation sector.
- Develop Kerry's 'Christian/Pre-Christian' story.
- Develop Literary and Folklore destinations e.g. in North Kerry.
- Exploit the potential of the region's island and Gaeltacht products.

### 4.3 MARKETING

#### Key Marketing Objectives

- To grow the region's overseas holiday visitors to Ireland.
- To at least hold share of domestic markets – Republic and Northern Ireland.
- To attract an increased volume of bednights in paid serviced accommodation.

#### Key Strategies

- Focus on the appeals of selected and motivational themes of the region to attract more stay-over and higher spending visitors.
- Launch a phased market development campaign with Tourism Ireland, featuring a broader cross-border region in selected markets.
- Boost publicity for events in the domestic market.
- Integration and complementary strategies with industry partners and local tourism bodies for maximum impact to redress negative perceptions.
- Develop more aggressive online marketing campaigns.
- Optimise the use of new media communication and distribution channels.
- Adopt a more research-based approach to marketing and measurement.

A co-ordinated and integrated approach to destination and tactical marketing – working in partnership with Tourism Ireland, trade partners, county tourism organisations, and carriers – will be essential to sustaining growth. The planned marketing programme is rooted in consumer and industry trends and will be based around the following activities:

- Support of Tourism Ireland’s campaigns in overseas markets by participating in trade and consumer promotions, handling visiting travel trade and media, and providing product offers and web content
- Promotional campaigns in each of the top overseas source markets
- Undertake consumer and trade promotion to secure North American tour traffic, in ‘open skies’ era
- Promote cultural and heritage attractions of the region, including islands
- Exploit market opportunities for air route development into Cork and Kerry airports
- Secure focused publicity exposure in key overseas markets
- An aggressive Business Tourism promotional campaign for the region
- Lead the South West’s year-round Discover Ireland campaign
- Relaunch and actively promote website (online and offline marketing)
- Promote themed holidays and events
- Support the further development of the national Tourism Content System (TCS) as the basis for visitor servicing operations and marketing fulfilment
- Develop a comprehensive intra-regional communication programme for the industry, using online and offline media to supply up-to-date information on things to do and see, festivals, events and entertainment.

#### 4.4 ENTERPRISE DEVELOPMENT

Fáilte Ireland South West’s tourism-specific services to support business development and enterprise growth have recently been strengthened with a new position of Business Development Manager. The objective is to influence the design, theme, format and range of industry supports, working closely with Fáilte Ireland’s Enterprise Development division.

The existing range of Fáilte Ireland skills and professional development services including Optimus, Performance Plus and Locally-Based Training Networks will continue to be widely promoted but as an integral element of the new regional strategy, they will be supplemented by new initiatives to support the core goals in the South West regional strategy.

The key strategic objectives for the immediate future will be:

- Identify and develop industry training and business development programmes to support the region's tourism product development strategies and to meet specific regional needs
- Encourage industry support for skills enhancement programmes in line with regional and national objectives
- Encourage innovation within the industry
- Liaise with third-level colleges in terms of innovation and networking initiatives
- Provide an expert enterprise support service in co-operation with LEADER companies and others as appropriate
- Provide regional intelligence and feedback to central services to influence service development and policy.

Future training and skills enhancement initiatives will be developed in consultation with the key industry groups. These will support the specific objectives outlined earlier in terms of establishing new product provision through the establishment of networks of co-operation across the regional product range and with a special focus on the needs of small enterprises.

Particular attention will be paid to Innovation and Business Incubation and the provision of services via SEED, Fáilte Ireland's new Small Enterprise Enhancement and Development Unit. Facilitation of IT use by smaller companies and the effective exploitation of new technologies, in the context of business operations as well as marketing and visitor servicing, will also be a priority.

Overall there will be a greater focus on effective networks and clusters in order to leverage the power of individual enterprises and, in line with national policy, the provision where possible of ongoing support as opposed to one-off interventions.

#### 4.5 VISITOR SERVICING

A network of 'Discover Ireland Centres' is being rolled out by Fáilte Ireland as a key strategic component of providing a better visitor information service across the country.

The new concept will focus on providing comprehensive and high quality visitor information in a pleasant environment, delivered by a combination of personalised concierge service and high-tech self-service kiosks. The ambiance of the new centres will be visitor friendly, with the service designed to cater to individual needs.

Over the next three years all existing Tourist Information Offices will be rebranded to provide an improved and a more visitor-friendly service. Killarney, one of five pilot centres, will open for the 2008 season, followed by Cork City. Details as to further TIO developments within the region will follow during the course of 2008-2010.

As a general principle, ready access by visitors to timely, quality information is critical both before and after arrival. Key benefits will include increased visitor satisfaction and visitor expenditure as well as improving visitor contact with the people, the landscape and the culture of the region, thus helping to fulfil visitors' expectations of the regional offer and generate repeat visits and customer loyalty.

A second element of major importance is the potential for improving cross-selling of local products and promotion of new and/or last-minute product offers, not just by TIOs but also by the businesses of the region themselves as well as the expansion of business-to-business collaboration. The effective use of the Internet and related new technologies are regarded as being a top priority and, as with Enterprise Development above, the facilitation of IT use by smaller companies and the effective exploitation of new technologies, in the context of business operations as well as marketing and visitor servicing, will be a priority.

#### 4.6 TARGETS


Ambitious targets have been set for the period 2007-2010 with a particular focus on at least maintaining share of all markets in the face of increasing competition from other parts of Ireland. The key target is to continue to grow overseas visitors and revenue while attracting more domestic visitors.

By 2010, the region would aim to earn up to €1.4 billion from all visitors, with the number of holiday visitors exceeding 2.8 million per year.

Table 401: 2010 Targets – Holiday visitors

	2006	Low	Mid	High
Domestic/NI	1.0m	1.08m	1.12m	1.17m
Overseas	1.37m	1.54m	1.60m	1.66m
Total	2.37m	2.62m	2.72m	2.83m





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## Summary Action Plan

Elements	Rationale	Lead and Partner	Timeframe
<b>Strategic objective 1: Build on the region's position as Ireland's leading tourism destination outside Dublin</b>			
<b>1.1 Develop and deliver high quality nature-based holiday experiences, integrating wellness with adventure and related activities ('Nature and Nurture'), based around established tourism service centres</b>			
a. South West Leisure and Adventure	<p>Action 1: Explore potential of development of new strategically located adventure centres and facilities.</p> <p>Action 2: Development and marketing of the South West Adventure proposition, focusing on eco-friendly land, air and water activities.</p> <p>Action 3: Development of further walking routes across the region, particularly themed and iconic routes.</p> <p>Action 4: Increase focus and development on integrating activities with the accommodation sector, with particular focus on rural accommodation ('play and stay').</p> <p>Action 5: Monitor progress effecting access to the countryside and assume an advocacy role as necessary.</p>	<p><b>FISW</b></p> <p>Local Authorities</p> <p>LEADER</p> <p>Trade</p>	<b>2008-2010</b>
b. South West Heritage	<p>Action 1: Identify potential to develop an Irish Diaspora/Genealogy centre in the region and improve access to genealogy records in the region.</p> <p>Action 2: Adopt an integrated approach to the development and marketing of key heritage trails in Cork and Kerry e.g. Atlantic and Heritage Film Trails.</p> <p>Action 3: Promote the establishment of a regional Film Commission.</p>	<p><b>FISW</b></p> <p>Local Authorities</p> <p>LEADER</p>	<b>2008-2010</b>
c. Houses and Gardens	<p>Action 1: Marketing of themed 'Great Castles, Houses and Gardens of the South West'.</p> <p>Action 2: Develop the 'Tropical Gardens' of the South West (to include Kenmare/Garnish/Glengarriff etc.)</p> <p>Action 3: Encourage the development and restoration of key regional Gardens and Houses eg Youghal, Fota, Bantry, Killarney, Doneraile.</p>	<p><b>FISW</b></p> <p>Local Authorities</p> <p>Heritage Council</p> <p>LEADER</p>	<b>2008-2010</b>
d. Family Fun	<p>Action 1: Promote the development of all-weather family facilities in the South West.</p>	<p><b>FISW</b></p> <p>Private Investment</p> <p>Local Authorities</p> <p>LEADER</p>	<b>2008-2010</b>

Elements	Rationale	Lead and Partner	Timeframe
e. Major Festivals and Events	<p>Action 1: Encourage the development of two major festivals in the region capable of attracting overseas visitors, in strategic locations with the necessary transport routes and accommodation base.</p> <p>Action 2: Establish the potential to harness major sporting events, capable of showcasing the region's strengths .</p>	<p><b>FISW</b> Local Authorities LEADER</p>	<b>2008-2010</b>
f. Leisure Cruising	<p>Action 1: Encourage the development of the South West as a destination for cruise ships (docking, tendering, touring).</p>	<p><b>FISW</b> Port of Cork Local Authorities</p>	<b>2008-2010</b>
g. Natural wellbeing destination for Mind, Body and Soul	<p>Action 1: Increase cross-marketing of Cork and Kerry's existing nature-based assets: wellness, outdoor activities, adventure and scenery.</p> <p>Action 2: Encourage the development of a number of specialist wellness centres.</p>	<p><b>FISW</b> Local Authorities LEADER Trade</p>	<b>2008-2010</b>
h. Ireland's 'natural' kingdom	<p>Action 1: Ensure the sustained growth of Killarney and Ring of Kerry as a primary hub with particular emphasis on the county's carrying capacity.</p> <p>Action 2: Position the region as a leading destination for nature-based leisure activities.</p> <p>Action 3: Encourage the development of a UNESCO Geopark in Kerry, as a key tourism attractor.</p> <p>Action 4: Encourage the development of a major attraction to celebrate and stage natural culture.</p> <p>Action 5: Investigate the possibility of developing and implementing an 'Eco-friendly Charter' across trade sectors in the region commencing with accommodation, activity providers and attractions and extending across other business sectors.</p> <p>Action 6: Investigate the possibility of developing an Iconic 'Voyage of Brendan' walking route.</p>	<p><b>FISW</b> Local Authorities <b>OPW</b> <b>SKDP</b> Local Authorities LEADER</p>	<b>2008-2010</b>
i. South West Business Tourism	<p>Action 1: Encourage the marketing of the South West region as a business tourism destination, linking Cork with Killarney and South Kerry's existing offering.</p>	<p><b>FISW</b> Local Authorities Cork Business Bureau KITE IHF Cork and Kerry Killarney Chamber of Commerce</p>	<b>2008-2010</b>

Elements	Rationale	Lead and Partner	Timeframe
<b>1.2 Position the City of Cork as a principal gateway to the region and as a major urban destination for business and leisure visitors</b>			
a. Cork City as a key urban destination	<p>Action 1: Major push to develop the business tourism sector in Cork, exploiting the city's strong accommodation and facilities base and improvements in direct air, road and rail access.</p> <p>Action 2: Ensure all necessary facilities (accommodation and leisure, golf, catering, touring, entertainment etc.) are fit for purpose for business tourism and well positioned to exploit the potential of the new Cork Convention Centre.</p> <p>Action 3: Encourage the development of a cultural central city shopping experience and communicate the City's strength as a 'Walking City'.</p> <p>Action 4: Promote the development of Cork Inner Harbour as a primary recreation and amenity facility with new visitor attractions and activities and explore the potential for maritime leisure activity in Cork's City Quays in the event that commercial activities are relocated.</p> <p>Action 5: Tales of Cork – develop a strategy to communicate and animate local stories of interest.</p> <p>Action 6: Develop the historic quarters of Cork, in particular explore the potential for a key tourism attractor in the Shandon Quarter.</p> <p>Action 7: Identify and promote entertainment developments.</p> <p>Action 8: Invest in the development of existing and new key day-trip attractors close to Cork City (e.g. Blarney, Midleton, Cobh, Kinsale).</p> <p>Action 9: Improve the transport system for day-trips from Cork City to key attractors.</p>	<p><b>FISW</b></p> <p>Local Authorities</p> <p>Cork Business Bureau</p> <p>Private Investment</p> <p>Transport Supplier</p>	<b>2008-2010</b>
<b>1.3 Exploit the maritime heritage and indigenous strengths of the region's coastal environs</b>			
a. Maritime Cork	<p>Action 1: Explore the development of a necklace of marinas stretching along the coastline.</p> <p>Action 2: Encourage the establishment of Ireland's National Maritime Museum in Cork Harbour/Cobh.</p> <p>Action 3: Investigate the tourism potential of Spike Island.</p> <p>Action 4: Develop and communicate the story of Cork's maritime history, including built heritage (Forts etc) spanning key locations along Cork's coastline and including West Cork's islands.</p>	<p><b>FISW</b></p> <p>Dept of the Marine</p> <p>Dept of Justice</p> <p>Dept of Finance</p> <p>OPW</p> <p>Comhdhail Oileain na hEireann</p> <p>Private Investment</p>	<b>2008-2010</b>

Elements	Rationale	Lead and Partner	Timeframe
b. Coastal Life – developing things to do and see	<p>Action 1: Extend Cork's Adventure Hub pilot project to other strategically located areas of Cork's Coastline.</p> <p>Action 2: Develop a number of 'Centres of Excellence' in sea-angling along the coastline.</p> <p>Action 3: Develop a regional coastal walking route.</p> <p>Action 4: Develop and market a West Cork island cluster, including a heritage trail and activities.</p> <p>Action 5: Develop a platform to market artisan crafts along the coast.</p> <p>Action 6: Develop and market the story surrounding 'Rebel Cork', including movie trails.</p> <p>Action 7: Capitalise upon regional success in the 2007 Eden Project, particularly Clonakilty District's title of 'Best Emerging Rural Tourism Destination 2007' drawing on strengths of the 'Fuchsia' brand and the regions nature and culture assets.</p> <p>Action 8: Develop boat-touring along the coastline.</p>	<p><b>FISW</b></p> <p>Local Authorities</p> <p>Comhdháil Oileáin na hÉireann</p> <p>LEADER</p> <p>Dept of the Marine</p>	<b>2008-2010</b>
c. 'Culinary Cork'	<p>Action 1: Work with food producers, suppliers, training centres, retailers, markets, restaurants, bars, cafés etc. to develop the concept of 'Culinary Cork' with all participants working towards a region-specific Food Charter, focused on visitor needs.</p> <p>Action 2: Develop a communication platform for Cork's local 'drinks' story, incorporating brands such as Murphy's, Beamish, Jameson and Hennessy.</p> <p>Action 3: Develop a strong seafood culture - creating visible links between the catching of fish and timely delivery to the consumer through markets, restaurants and retail.</p>	<p><b>FISW</b></p> <p>LEADER</p> <p>Trade Groups</p> <p>Local Authorities</p>	<b>2008-2010</b>
<b>1.4 Capitalise on the developmental and marketing opportunities presented by country pursuits and the cultural and linguistic heritage of the rural areas of Cork and Kerry</b>			
a. Country pursuits	<p>Action 1: Develop the Blackwater and Lee valleys as inland propositions for country pursuits</p> <p>Action 2: Explore the potential of development of Centres of Excellence for angling</p> <p>Action 3: Explore strategically located cycling, walking and equestrian routes</p> <p>Action 4: Develop the bundling and integration of activities with the accommodation provider sector</p>	<p><b>FISW</b></p> <p>LEADER</p> <p>Local Authorities</p>	<b>2008-2010</b>

Elements	Rationale	Lead and Partner	Timeframe
b. Cultural and linguistic heritage	<p>Action 1: Develop Kerry's 'Christian/Pre-Christian' story.</p> <p>Action 2: Develop Literary and Folklore destinations e.g. in North Kerry and North Cork.</p> <p>Action 3: Exploit the potential of the regional islands and Gaeltacht product.</p> <p>Action 4: Support the delivery of a new cultural arts facility in Skibereen.</p>	<p><b>FISW</b></p> <p>LEADER and MFG</p> <p>Local Authorities</p> <p>Udarás na Gaeltacht</p>	<b>2008-2010</b>
<b>Strategic Objective 2: Improve transportation links to and within the region</b>			
a. Air Services: Exploit market opportunities for new services to Cork and Kerry Airports	<p>Action 1: Exploit marketing opportunities presented by existing and additional air access routes into both Cork and Kerry airports, in co-operation with Tourism Ireland and according to market priorities e.g. Britain, near Europe etc.</p> <p>Action 2: Monitor impact of Open Skies on region.</p>	<p>Cork Airport</p> <p>Kerry Airport</p> <p><b>FISW</b></p> <p><b>Tourism Ireland</b></p>	<b>2008-2010</b>
b. Rail and Bus - improve the tourism focus of existing and potential rail and bus services to the South West	<p>Action 1: Support an increased frequency of rail services on the Dublin-Kerry routes, capitalising upon the Mallow link, identified as a hub under the Atlantic Gateway Initiative.</p> <p>Action 2: Encourage the introduction of integrated all-island ticketing to facilitate greater visitor exploration on an 'Ireland by Rail' basis.</p> <p>Action 3: Work with local stakeholders and national authorities to give a higher focus to visitor traffic on rail routes, with particular focus to new Cork-Midleton and Cork-Blarney links.</p> <p>Action 4: Encourage the development of a Cork-Galway rail link.</p> <p>Action 5: Work with bus transport providers to encourage greater integration of scheduling and ticketing with rail.</p> <p>Action 6: Encourage improvements in rail bicycle carriage facilities.</p>	<p>Irish Rail</p> <p>Bus Éireann</p> <p>Local Authorities</p> <p><b>FISW</b></p> <p><b>Tourism Ireland</b></p>	<b>2008-2010</b>

Elements	Rationale	Lead and Partner	Timeframe
c. Roads and signposting	<p>Action 1: Work closely with the National Roads Authority and the Local Authorities in the roll-out of the national roads programme, with particular focus on N22 upgrades.</p> <p>Action 2: Actively monitor the introduction of the new national sign-posting programme for tourism, being piloted along the N11.</p> <p>Action 3: Continue to liaise with the Local Authorities in addressing deficits in local and regional sign-posting taking particular account of the known high volume of visitor dissatisfaction with Ireland's sign-posting systems</p> <p>Action 4: Work with National Roads Authority and Local Authorities to minimise the impact of road maintenance on touring traffic during peak season.</p> <p>Action 5: Monitor opportunities for Cork as a primary gateway under the Atlantic Gateway Strategy, and monitor opportunities for Kerry as a linked hub.</p>	<p><b>NRA</b></p> <p>Local Authorities</p> <p><b>FISW</b></p>	<b>2008-2010</b>
d. Port of Cork	<p>Action 1: Promote the development of new routes into Cork.</p> <p>Action 2: Promote Cork as a ferry port for additional passenger services.</p> <p>Action 3: Develop the Cruise ship market to the South West, using the Port of Cork as a primary hub for Cork and Kerry.</p> <p>Action 4: Exploit marketing opportunities presented by existing and additional car-ferry operations using the port because of the special importance of the car-brought market.</p> <p>Action 5: Highlight the Tarbert-Kilimer ferry route as an alternative access to Kerry.</p>	<p>Port of Cork</p> <p>Shannon Ferries</p> <p>Local Authorities</p> <p><b>FISW</b></p> <p>Tourism Ireland</p>	<b>2008-2010</b>

## APPENDIX 1: CONSULTATIONS

The following stakeholders were invited to participate in focus group or one-on-one consultations with TTC and Fáilte Ireland South West in the process of preparing this strategic document. Fáilte Ireland South West would like to thank all those concerned for their input and submissions.

Atlantic Sea Kayaking  
Ballybunion Marketing  
Ballyhoura Fáilte  
Bantry Tourism Association  
Blackwater Leader Group  
Blackwater Resources – Avondhu Development Group  
Brittany Ferries  
Bus Éireann  
Caravan and Camping Ireland SW  
Clonakilty Chamber of Tourism  
Coach Tourism and Transport Council  
Cobh Tourism  
Comhdháil Oileáin na hÉireann  
Cork Airport  
Cork Business Association  
Cork Butter Museum  
Cork Chamber of Commerce  
Cork City Arts Officer  
Cork City Challenge  
Cork City Council – Director of Services  
Cork City Gaol  
Cork City Heritage Officer  
Cork City Manager  
Cork City Mayor  
Cork County Development Board  
Cork Convention Bureau  
Cork County Arts Officer  
Cork County Council  
Cork County Heritage Officer

Cork County Manager  
Cork County Planning Policy Unit  
Cork IT  
Cork Marketing Partnership  
Cork Midsummer Festival  
Cork North Enterprise Board and Blackwater Valley Tourism  
Cork Week  
Crag Cave  
Development and Tourism Officer – Kerry County Council  
Dingle Peninsula Tourism  
East Cork Area Development  
East Cork Tourism  
Farmhouse Association  
Heritage Officer – Kerry County Council  
Hidden Ireland Tours  
Holiday Tralee  
Iarnród Éireann  
International Sailing  
IRD Duhallow Ltd  
Irish Farmhouse Holidays  
Irish Hotels Federation – Cork branch  
Irish Hotels Federation – Kerry branch  
IT Tralee  
Kenmare Tourism  
Kerry Airport  
Kerry Arts Officer  
Kerry Co. Development Board  
Kerry Co. Manager  
Kerry County Sports Officer  
Kerry Enterprise Board  
Killarney Chamber of Commerce and Tourism  
Killarney Riding Stables  
Killarney Summerfest  
Killarney Town Council  
Listowel Marketing Group

Listowel Town Council  
MFG - LEADER  
Muckcross House  
North and East Kerry Leader; Tuatha Chiarraí Teo  
North Cork Tourism Partnership  
North Kerry Walks  
NPWS  
Old Midleton Distillery  
Port of Cork  
Rose of Tralee  
South Cork Enterprise Board  
South Kerry Development Partnership:  
South West Region Fisheries Board  
South West Trails Officer  
South West Walks  
St. Finbarre's Cathedral  
SW Marketing PR  
SWING – Golf  
SWRTD BOARD  
TEAGASC  
The English Market  
The Park Hotel – Kenmare  
Titanic Trail  
Tourism Officer - Tralee Town Council  
Town and Country Homes  
Tralee Town Council  
Tuatha Chiarraí  
Udarás na Gaeltachta  
University College Cork  
West Cork Calling  
West Cork Enterprise Board  
West Cork Leader Group (Fuchsia)  
West Cork Marine Strategy  
West Cork Tourism  
Youghal





**Fáilte Ireland**

National Tourism Development Authority

Fáilte Ireland South West,  
Áras Fáilte, Grand Parade,  
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