

Draft November 2021

Killarney

Destination Experience Development Plan



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WILD ATLANTIC WAY

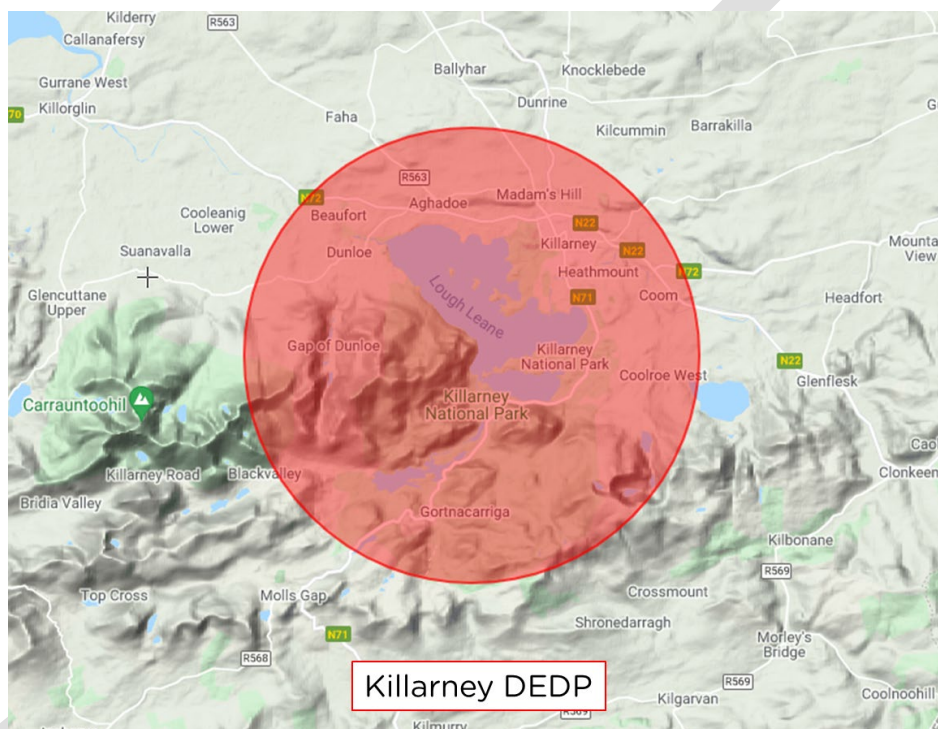
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EXECUTIVE SUMMARY
The Plan at a Glance

EXECUTIVE SUMMARY - THE PLAN AT A GLANCE

The Killarney Destination Experience Development Plan (KDEDP) is a destination development plan designed to build on a new collective vision for tourism in Killarney. It is designed to enhance the way in which visitors experience the town while maximising its role as the principal exploration base for the wider Kerry tourism economy. The plan will provide a destination development focus for the next five years, harnessing existing strategic plans and examining new projects to create a world class destination. Central to the development theme will be the adoption of a responsible approach to how the town integrates with its natural assets in creating new and motivational town experiences for visitors.



The plan will build upon and extend the existing culture and heritage of Killarney through the creation of cultural quarters. It will create defined linkages between areas of historic and cultural significance while blending Killarney National Park into the core town experience. The vision for Killarney supports universal access throughout the town core, the transition from car predominance to pedestrian priority and provide for low carbon mobility solutions within the town core area. It will replicate and build upon the environmental value of the UNESCO Biosphere of the National Park and adjoining areas. The ambition is to deliver a sustainable tourism destination combining world leading outdoor experiences, accessible from a town rich with cultural experiences. It will encourage visitors to stay longer in the destination and adopt Killarney as a base to explore the Wild Atlantic Way and the extended Kerry visitor experience.

The plan reflects the destination focus now required in the short and medium term to address the 'new normal' operational environment and will identify how domestic and overseas visitors are welcomed back to the destination after the COVID-19 pandemic. Equally, the objectives reflect the contribution of this plan to achieving the goals of 'People, Place and Policy: Growing Tourism to 2025'. It is designed to address the new challenges around re-establishing visitor numbers, rebuilding domestic and overseas visitor revenue and securing

local employment. The longer-term focus is on developing destination resilience after the destination emerges from the post COVID-19 recovery phase.

Killarney occupies a very significant place in Irish tourism. It has evolved from its historical association as Ireland’s original tourism destination to become an internationally recognised tourism hub. It continues to support regional tourism growth through its role as a touring base, generating significant levels of visitor flow across the county. It is recognised as a key base and access point to the Wild Atlantic Way and an access point to many globally iconic and ‘bucket list’ visitor experiences. It has nurtured a destination proposition combining the vibrancy of the town with its spectacular outdoor setting adjacent to the National Park. The new destination ambition will be realised by maximising the opportunities presented by its natural and built heritage and cultural assets to develop a world class tourism destination.

This world class ambition requires a new development focus. It will ensure the Killarney town experience will match the quality of its stunning natural environment. It will support the development of tourism industry capacity and capabilities to react to the new opportunities the proposed visitor experience and infrastructural investment can realise. The projects outlined within this plan will be aligned with a new tourism vision for Killarney, delivered through enhanced town and outdoor experiences. The historical engagement of the town with Killarney National Park has laid the foundations in creating one of the country’s leading tourism economies. Increased connectivity, innovation and new approaches to experience development are now required to further integrate the natural and urban assets. This will be achieved through a new focus on the collective town experience and an accessible range of outdoor experiences delivered by a world class tourism industry.

An awe inspiring destination of the future delivered by a world renowned tourism industry

Killarney Destination Vision

A destination of the future tourism leadership to meet new and evolving visitor trends.

Delivering

An awe inspiring tourism destination.... world class visitor experiences differentiated through the warmth of its people, rich culture and heritage and stunning natural environment.

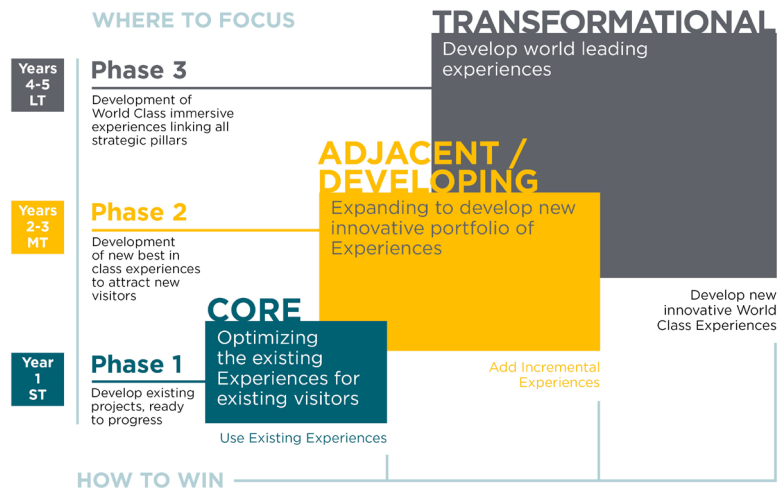
Delivered by

A world-renowned tourism industry..... that transforms every visitor’s experience of Killarney through our tradition of hospitality supported by a community who proudly share our natural, built and cultural heritage with our guests.



The plan focuses on two core development themes capturing the importance of Killarney town itself while enhancing how our visitors engage with the inspirational outdoors in a responsible and sustainable way. The vision is to match the world class natural environment with an exceptional urban visitor experience. The proposed projects within this plan are designed to interweave the fabric of the Killarney town experience seamlessly with the National Park experience. This will be achieved through a series of inter-related sustainable transport and public realm improvements in addition to new approaches to traffic management.

Five strategic development pillars will ensure all aspects of the Killarney visitor experience are addressed. The plan implementation will focus on projects identified under the categories of enhancing the town, developing the Killarney brand, developing new experiences for visitors, improving the capacity of the tourism industry while ensuring national and international destination competitiveness. The projects included in the plan reflect tourism industry and stakeholder objectives to ensure Killarney is positioned to react to new visitor expectations and to how experiences are delivered, ensuring Killarney will become a destination of the future.



The approach adopted within the KDEDP is based on an experience growth model. It will build on existing visitor experience assets and enhance them to provide compelling reasons to visit the Killarney area. In the immediate term, the tourism industry will focus on enhancing the existing portfolio of experiences that optimises the current level of visitor experience provision. This will progress over the medium term to an expansion of the existing portfolio of saleable experiences, through new experiences or an expansion of existing experiences. Over the longer term of the plan, the vision is to deliver a series of catalyst projects that will collectively become transformational in the performance of the destination while addressing the challenges identified by all stakeholders in the consultation phase.

PLAN OBJECTIVES

- Deliver the vision for Killarney in becoming a world class destination strongly differentiated through the integration of its stunning natural environment with a quality urban experience.
- Provide a short, medium to long term focus for post COVID-19 recovery while building resilience in the long term through a new strategic destination development approach.
- Develop a coherent destination brand approach communicating the Killarney visitor experience, building on the essence of the place, its people and status as a base and access point to the Wild Atlantic Way.
- Grow the economic impact of tourism activity through season extension and extending the length of stay in Killarney.
- Leverage the visitor potential of Killarney National Park and the uniqueness of the urban and outdoor experience proposition as a key USP for domestic and international visitors.
- Develop a coherent visitor experience pathway that aligns all members of the tourism industry to deliver great Killarney experiences and ensuring consistency across the destination.
- Maximise the Wild Atlantic Way opportunity for Killarney and the positioning of the town as a key exploration base for the wider Kerry visitor experience.

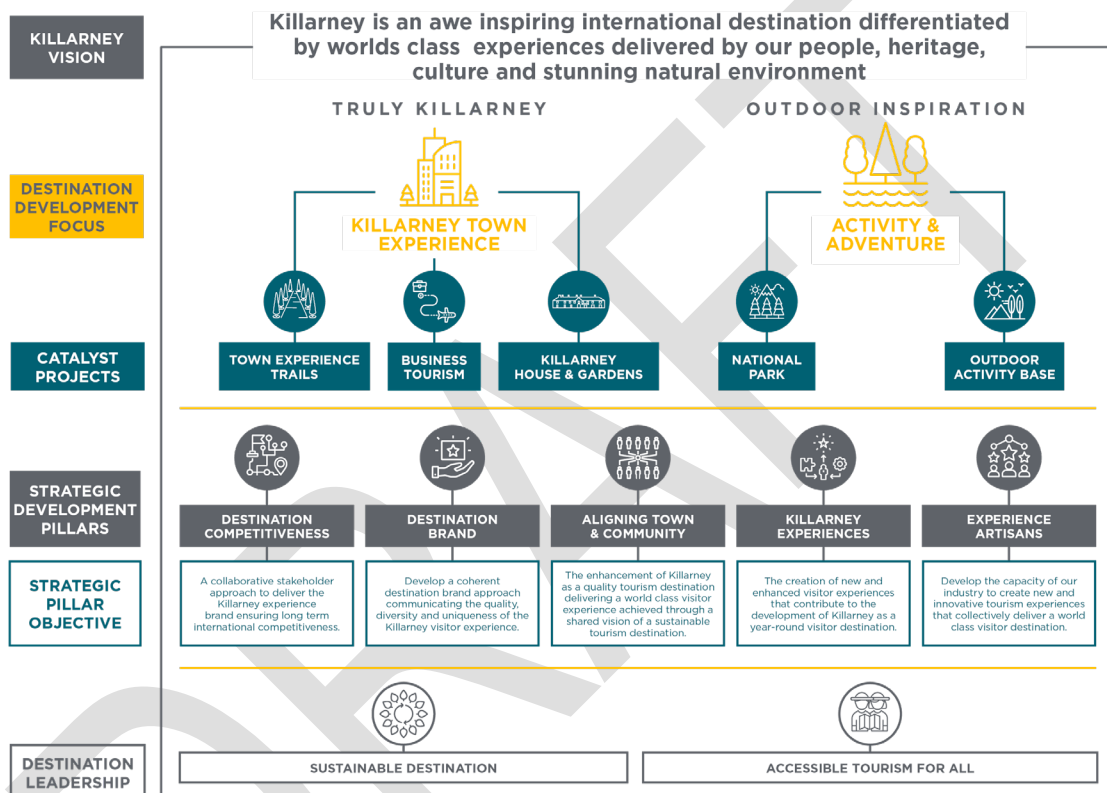
- Promote tourism vibrancy throughout the town through enhanced visitor flow and orientation throughout the town, its facilities and surrounding amenities.
- Address the challenges of evening economy provision while increasing the range of things to do during the day.
- Maximise the capacity of the town as a leading business tourism / MICE destination.
- Develop the opportunity for the destination through the hosting of leisure and business events.
- Work with the tourism industry to improve their capacity to deliver new and enhanced experiences and product / experience knowledge within the destination.
- Protect, sustain and enhance the natural environment of the Plan area.
- Develop Killarney as a tourism destination that is “accessible for all”.
- Contribute to sustainable destination development through the adoption of the VICE model as international best practice proactively embraced by all stakeholders.

DRAFT

KDEDP Delivery Framework

Strategic Development Pillars - Creating the conditions to developing new experiences.

In order to achieve the long term strategic objectives of the KDEDP, the plan framework is structured around a number of interdependent layers of activity. These provide a distinct development focus aligned with achieving a collective vision for Killarney. This is built upon five areas of strategic development focus i.e. strategic development pillars. Each of these pillars contains a number of development projects contributing to the overall vision within five years.



These strategic pillars focus on the key destination development principles of creating a great place to visit (town and place focus) while enhancing the existing and creating new visitor experiences to stimulate ‘product’ supply. The capacity of the tourism industry will become a key area of attention, enabling the Killarney tourism trade to satisfy the demand and supply conditions required for destination recovery and resilience. The elements of focusing on the town experience and associated experience development while growing tourism industry capacity each align with the final strategic pillar. Destination competitiveness will require new approaches to destination branding and new levels of collaboration to realise a new vision.

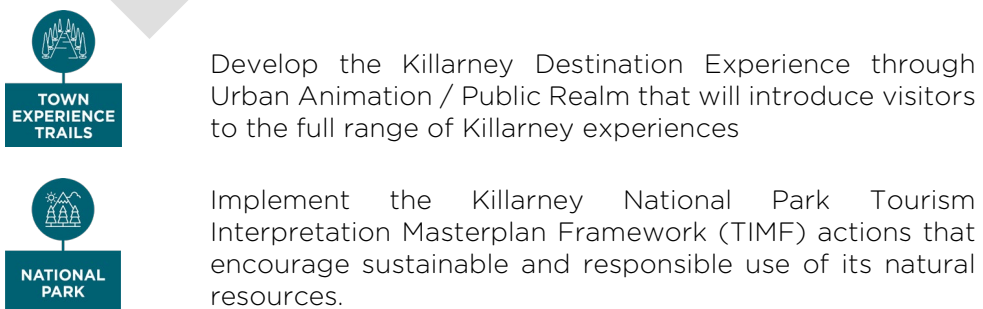
The five strategic development pillars are;

Strategic Development Pillars



Achieving the Vision through Catalyst Projects (Transformational)

The strategic pillars provide the framework for destination development containing destination development priorities centred on a number of projects. These projects are collectively viewed as having the capacity to be transformational for Killarney in achieving the plan objectives. The catalyst projects impact on each of the strategic development pillars in their capacity to impact on the town, new experiences and industry development - all contributing to longer term destination competitiveness.





Build the local capacity and conditions for Killarney to maximise the opportunity around outdoor activity and adventure that supports season extension.



Develop the competitiveness of Killarney as a national business tourism destination.



Maximise the potential of the current Killarney House and Gardens experience and future capacity for experience development

Destination Leadership Projects

Accessible tourism for all and sustainable tourism have been identified by the Killarney tourism industry as immediate areas for adoption. The desired focus is to progress these development areas beyond a functional level of compliance and collectively embrace these themes as future points of international destination differentiation. These are identified within the plan framework as Destination Leadership Projects to be embraced across all stakeholders from the tourism industry, ancillary service providers, agencies and the wider community base.



Adopt an industry and community wide approach in becoming a leading international destination for responsible tourism.



Develop accessible tourism ensuring 'Tourism for All' in Killarney and developing the town as the leading national destination for accessible tourism.

Destination Projects - (Developing the Core Visitor Experiences)

Across each strategic pillar, a range of additional development projects have been identified. These will support the delivery of the catalyst projects and contribute to achieving the vision for Killarney under the development themes of 'Outdoor Inspiration' aligned with the beauty of the area and accessing unique local experiences of Killarney Town - 'Truly Killarney, Outdoor Inspiration'.

WHY KILLARNEY

Killarney has evolved from one of Ireland's original tourism destinations to becoming an international 'must visit' tourism hub and is widely recognised as Ireland's tourism capital. The performance of the Killarney tourism industry has become a 'yardstick' for measuring national tourism performance.

Its scenic location and the uniqueness of the National Park setting in and around the town, combined with centuries of tourism innovation, has contributed to developing a visitor destination with significant global recognition and international appeal. Killarney's tourism base profile widely supports regional tourism growth that generates county wide economic benefits. It is recognised as a major base and access to the Wild Atlantic Way and is a key access point to many globally iconic experiences.

The town retains a position of national tourism importance and is accepted as an exemplar of best practice across many areas of tourism and hospitality delivery. Notwithstanding this tourism reputation, the destination faces a range of challenges in a fast-changing tourism environment, particularly in recovering from the COVID-19 pandemic. With tourism as its core economic sector, it must address the challenges of seasonality and become more agile in adapting to the changing profile and demands of the domestic and international visitor. The saleable experience base must expand through experience innovation while addressing key destination gaps such as the evening economy provision. Addressing these destination challenges will require a collaborative approach to ensure Killarney 'future proofs' itself and reacts to changing visitor preferences.

In order to support the ambition around sustainable destination growth, the KDEDP is designed to guide Killarney and its stakeholders through a five year development focus through continuous improvement and experience innovation. The KDEDP is aligned with a number of existing strategies, policy and industry reports. They include;

- Fáilte Ireland Strategic Plan
- People, Place and Policy: Growing Tourism to 2025' Department of Transport, Tourism and Sport.
- Kerry Tourism Strategy (2016-2022), Kerry County Council
- Experiencing the Wild Heart of Ireland - A Tourism Interpretative Master Plan for Ireland's National Parks (2018), National Parks and Wildlife Service
- Kerry Convention Bureau Roadmap for Growth - 2019-2023
- TEIR One, (2018), Killarney Chamber & Tourism Council

The following provides an overview of the key actions identified within the reports that directly relate to tourism development with implications for Killarney.

FÁILTE IRELAND STRATEGIC PLAN

The national tourism development plan supported by regional development plans.

PEOPLE, PLACE AND POLICY: GROWING TOURISM TO 2025

'People, Place and Policy: Growing Tourism to 2025' includes a focus on growing visitor numbers, overseas revenue and employment. In achieving these, the plan also addresses the challenges of seasonality, regional dispersion of visitors and sustainability. This policy

statement is centred on Ireland achieving its full potential as a destination for overseas tourism. However, it is recognised that the domestic tourism market underpins the range of visitor accommodation and services that provide competitive advantage to Ireland in the international market and many of the measures contained in this statement will similarly benefit the domestic tourism sector.

KERRY TOURISM STRATEGY

The Kerry County Council Tourism Strategy 2016-2022 refers to a range of actions designed to develop tourism in Killarney.

- Install electronic tourist information signs, at appropriate locations, in the town. (Communications 1.5.5)
- Progress the Fossa Way proposals around Lough Leanne and link Fossa to the Gap of Dunloe in Killarney, in a sustainable manner. (Walks 1.8.1)
- Devise traffic management plan for Killarney. (Road Access 1.11.5)
- Provide all-weather coverings in Main Street, Killarney to facilitate weather independent events in the town centre. (Visitor Attractions 1.12.4)
- Maximise the potential of Killarney House and facilities. (Visitor Attractions 1.12.7)
- Further develop other onsite buildings on the Killarney House site in a sustainable manner. (Visitor Attractions 1.12.8)
- Provide an outdoor gymnasium at an appropriate location in Killarney. (Visitor Attractions 1.12.9)
- Extend the Ross Road Cycle Path/Walkway in Killarney, in a manner compatible with environmental protection objectives. (Cycling 2.2.2)
- Provide environmentally friendly hikes for wildlife enthusiasts at appropriate locations in Killarney National Park. (Natural Heritage 3.2.3)
- Develop a Killarney Lakes History and Boating Museum. (Natural Heritage 3.2.4)
- Promote Killarney horse racing festival to international visitors. (Community Tourism, Events & Festivals 4.12)

NATIONAL PARKS MASTERPLAN

Killarney National Park actions detailed in 'Experiencing the Wild Heart of Ireland - A Tourism Interpretative Master Plan for Ireland's National Parks' (2018)

- Rebrand and configure Killarney National Park around Killarney House and Knockreer Education Centre, as the core interpretative centre, with branded signage and messaging. (K.1)
- Apply the new Killarney National Park Interpretative Framework based on identified themes of lakes, mountains, oak and yew woods, Lusitanian flora and a rich array of legends. (K.2)
- Map out the full range of recreational experiences (walk/hiking/cycling/kayaking etc) available and assess suitability for promotion to visitors on printed maps and Map-broads. (K.3.1 Improved access to nature and cultural heritage in the wider park)
- Enhance ecclesiastical and mining heritage interpretation including self-guiding trails with brochures of Ross Castle & Island boat trips to Inisfail Island. (K.3.2 Improved access to nature and cultural heritage in the wider park)
- Increase boat trips and kayaking experiences on the lakes. (K.3.3 Improved access to nature and cultural heritage in the wider park)

- Develop expert seasonal guided walks (flora/trees; geology & landscape; bats/nocturnal animals; deer rutting). (K.3.4 Improved access to nature and cultural heritage in the wider park)
- Promote the Kerry Way to Reenadinna Wood to view one of the best yew woodlands in Europe. (K.4.1 Enhanced recreational walking/hiking/cycling in the wider KNP)
- Foster a cycle/walk to Colleen Bawn and Dinis Island; stopping off for refreshments at the 'Meeting of the Waters'. (K.4.2 Enhanced recreational walking/hiking/cycling in the wider KNP)
- Promote the Kerry Way trail along Esknamucky Glen from Torc Waterfall to Galway's Bridge. (K.4.3 Enhanced recreational walking/hiking/cycling in the wider KNP)
- Provide improved access to Mangerton Mountain and Devil's Punchbowl; shuttle transfers. (K.4.4 Enhanced recreational walking/hiking/cycling in the wider KNP)
- Develop links to Reeks Mountain Forum, with improved access to Purple and Tomies Mountains. (K.4.5 Enhanced recreational walking/hiking/cycling in the wider KNP)
- Encourage arts events in Killarney National Park in coordination with the community e.g. opera at Killarney House; sculptures as access points to trails. (K.5)
- Endorse sustainable cycle trails network, from Killarney House. (K.6.1 Sustainable Transport within and without the Park)
- Complete Lough Leane Cycle Trail. (K.6.2 Sustainable Transport within and without the Park)
- Provide cycling route options to Gap of Dunloe; with return by lake boat. (K.6.3 Sustainable Transport within and without the Park)
- Establish scheduled shuttle bus from Killarney House via Muckcross to Lady's View and Moll's Gap. (K.6.4 Sustainable Transport within and without the Park)
- Explore the option of charging for car parking at Muckcross to encourage people to use the shuttle bus service. (K.6.5 Sustainable Transport within and without the Park)

KERRY CONVENTION BUREAU ROADMAP FOR GROWTH - 2019-2023

The vision for the Kerry Convention Bureau Destination Marketing Roadmap is for Kerry to be recognised as Ireland's premier business tourism destination for sustainability, community, social entrepreneurship and responsible tourism. Killarney is identified as one of five MICE centres in Kerry and will be a key element in the success of the MICE strategy.

The identified critical success factors driving the strategy include;

- Development of Kerry USP's e.g. leading Irish destination for Accessible Tourism and/or Sustainability and/or CSR.
- KCB and industry developing targeted sales focus - Go Get approach & implementing collaborative sales initiatives.
- Implementation of effective sales activities targeting international Association Conference business.
- Increase in pipeline of shoulder season business when Kerry can be most competitive.
- KCB attending range of relevant, international trade events, outside of headline shows.
- Revitalisation of relationships with DMC's.
- Increased regional awareness with international audience.
- Expansion of Kerry Conference Ambassador Programme.
- Progression of Accessible Tourism pilot project.

- Development of creative and innovative CSR activities.
- Implementation and support of regional sustainability initiatives, aligned with United Nations Sustainability Development Goals.
- Annual improvement in Kerry ranking on GDS-Index.
- Collaboration between FI and RCB's and further development of Convention Bureau of Ireland initiative.
- Increased engagement with SITE.
- Refresh of MICE product offerings and animation of small product offering.
- Nurture and fostering of relationships with local activity partners/specialists to expand product range.
- Alignment of Business Tourism Roadmap with Killarney DEDP and regional Destination Experience Development Plans (DEDP's).
- Raise profile of KCB locally, nationally and internationally to become event planners preferred route to market.
- Increase ability to add value, enhance programs and maximise KCB member opportunities.
- Establish KCB fund to provide additional supports to events which fall outside of FI financial support programme.

KILLARNEY TEIR ONE

The Killarney TEIR One is an independent industry report assessing the impact of tourism on Killarney. The following represent a number of the recommendations with particular relevance to the KDEDP.

- Investment in the infrastructure required to increase the carrying capacity of Killarney i.e. ability to manage increasing traffic and visitor volumes.
- Ensuring Killarney continues as a catalyst for tourism dispersion and continues its role in attracting visitors to the south west.
- Supporting direct international access to the West coast to contribute to balanced economic development and the issue of regionality.
- Prepare for the Brexit challenge and build on Killarney's strong appeal within the North American and Mainland European markets to offset any potential risk in the UK marketplace.
- Enhance the product mix in the town to build the town's capacity to attract and retain visitors i.e. indoor visitor attractions, extended evening economy options.
- Investment in key products or segments that will address the seasonality challenges faced by Killarney and the wider Kerry area.



WILD ATLANTIC WAY

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SECTION ONE

Key Result Areas and Targets

1.1 KEY RESULT AREAS AND TARGETS

The overarching objective of the KDEDP is to sustainably increase the economic benefit of tourism to the area. Equally, the plan is designed to provide a destination development focus that aligns all stakeholders with an agreed vision through the adoption of a five year pathway to achieve this ambition.

Specific KPIs will be baselined and monitored throughout the lifecycle of the plan. The impact of the KDEDP will be measured through the monitoring of key metrics that examine the commercial development of tourism across the area.

The plan framework adopts the VICE model as a means of measuring success. The VICE Framework identifies sustainable tourism as the interaction between **V**isitors, the **I**ndustry that serves them, the **C**ommunity and culture that hosts them and their collective impact on and response to the **E**nvironment where it all takes place.

1.2 KEY PERFORMANCE INDICATORS

The measurement of success will include analysis of the following areas of performance over the course of the KDEDP.

1. Demand side conditions
2. Supply side conditions
3. Destination development
4. Environment

Demand Side - Visitor

1. Increase bednights in Killarney by 2% YoY ahead of regional average from year 3 of implementation of the KDEDP.
2. Increase in visitor numbers in off peak season.
3. Increase the value of visitors to Killarney over volume.
4. Increase visitor satisfaction.

Supply Side - Industry

5. Increase Saleable Products (five new or improved saleable experiences per annum) and a tailor-made distribution plan for the town.
6. Season Extension: Extend opening hours annually by 5% annually per DEDP.

Destination Development

7. Coherent approach in developing Killarney as a leading international destination for responsible tourism.
8. Brand alignment for Killarney across all of the industry.
9. Attain status as a tourism destination which is “accessible for all”.
10. Deliver on key sustainable tourism targets in areas of focus such as traffic and transport.
11. Heighten market awareness of the range and diversity of experiences that introduce the visitor to the wider Killarney area proposition.

Environment

12. Develop effective management of the environment, including natural, cultural and heritage assets through the progression of a DEDP Monitoring Programme.



WILD ATLANTIC WAY

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SECTION TWO Setting the Scene

2.1 EXPERIENCE BRANDS

DESTINATION EXPERIENCE DEVELOPMENT PLANS AND THEIR OBJECTIVES

The KDEDP is designed to enhance the existing tourism proposition of the town that will contribute to its evolution as a base and access point to the Wild Atlantic Way and meet its ambitions in becoming a world class destination. The KDEDP is structured around the successful Destination Experience Development Plan framework (DEDP's). These are designed to maximise destination economic potential through a five year development plan focused on delivering brilliant visitor experiences.

Developing a visitor experience requires a shift away from the traditional product versus price mentality. It is about delivering life enhancing moments that inspire visitors to share their experiences with others, but also make them want to return. The concept of experience development extends beyond simply providing an enjoyable experience for visitors. To achieve international cut-through in today's 'sharing economy', experiences need to utilise thematic interpretation techniques that evoke a positive emotional response in visitors.

The role of the KDEDP is to support the development of the world-class experiences focused on the town's rich heritage and natural assets while adding to the overall destination proposition. The purpose of this document is to present the destination development themes organised into an experience development framework to be adopted as a destination action plan for the next five years.

This framework will provide the context for tourism operators and stakeholders to work in partnership, create new and improved existing visitor experiences, and communicate coherent and unified stories to the visitor.

A Destination Experience Development Plan (DEDP) is a five year destination development plan for an area. The key objectives are as follows:

- Ensure the local experiences are brought to life through the development of the optimal mix of hero and ancillary products that get people into the area and retain them.
- Unlock the economic growth potential of an area by progressing a range of key initiatives that will motivate and facilitate potential tourists to visit and stay in the local area.
- Develop a sustainable basis for commercial development centred on creating strong signature experiences, supporting ancillary experiences that are commoditised through the creation of saleable experiences that excite consumers and buyers alike.
- Create the conditions to encourage international visitors to immerse themselves actively in the locale, by interacting with local people and engaging the senses by immersing themselves in the destination.
- Strengthen the value of tourism to the local community by providing employment opportunities.
- Extend the season for Killarney.
- Work with the Wild Atlantic Way to maximise its potential for Killarney and enhance visitor access to the Wild Atlantic Way visitor proposition.

Ireland's Experience Brands are at the heart of 'Tourism Brand Ireland'. They bring it to life, create the motivation for visitors to visit the island of Ireland by defining its diverse character

in a way potential visitors will understand. The Experience Brands provide the competitive advantage that separates Ireland from its competitors.

An Experience Brand therefore must be unique enough to stand out in the international marketplace and stimulate demand. Each Experience Brand must have a clear consumer proposition which ensures that a consistent approach is taken to the identification and development of memorable tourism experiences within these brands. They must also be distinctive in the international marketplace and differentiate itself from other Experience Brands within the island of Ireland and in other destinations.

An Experience Brand must:

- Be grounded in the consumer (travel values, social values, behaviours).
- Be motivational for international visitors.
- Be of scale - made up of a critical mass of related attractions and supporting experiences which are purchasable and accessible and supported by appropriate tourism infrastructure.
- Be more than one experience and usually a combination of supporting experiences which underpin one or two lead experiences.
- Be unified by a compelling story and one which has international relevance.
- Be capable of increasing dwell-time and/or driving economic benefit.
- Have a consumer led proposition, values, and theme(s).
- Be market-led and tested.

Sitting below the Brand Ireland pillars are four key propositions (or experience brands) which represent the country's areas of strategic importance. These four areas are:

Wild Atlantic Way - "Experience one of the wildest, most enchanting and culturally rich coastal touring routes in the world. Wherever you travel along the Wild Atlantic Way you'll find magic, adventure, history and beauty in abundance."



Ireland's Ancient East - "When you explore Ireland's Ancient East, you wander through 5,000 years of history. In these lush, green lands, tales of feuding dynasties hide behind crumbling Gothic architecture; ghostly tombs predate the pyramids; and knights, kings, monks and Vikings loom large in incredible stories."



Dublin, Surprising by Nature - "Dublin living thrives side by side with the natural outdoors so you can constantly jump between completely unique, different and often unexpected experiences."



Hidden Heartlands - "Explore the lush green heartlands of Ireland's natural rural beauty, where activity and relaxation are centred around rural communities and their lifestyles, that can be discovered across a lattice work of land and water trails showcased by the iconic River Shannon and the Beara Breifne Way."



Regional Tourism Plans (RTPs)

Fáilte Ireland are in the process of preparing Regional Tourism Plans for each of the four Regional Experience Brands (Dublin, Wild Atlantic Way, Ireland's Ancient East and Ireland's Hidden Heartlands). The purpose of the Regional Tourism Plans is to identify the sustainable tourism development priorities that will help to unlock the commercial potential of the region bringing benefits to all stakeholders and industry. Each plan will be prepared based on the VICE model which is a methodology for working towards sustainable tourism that seeks to strike an appropriate balance between the needs of the Visitor, the Industry and Community and the Environment. The plans will be for the period to 2025 and will be grounded in Fáilte Ireland's new Corporate Strategy. There will be a strong spatial element to the plans which will seek to identify where development should take place in order to unlock the tourism potential of the region.

The Regional Tourism Plans will also provide a strategic framework for a suite of Destination Experience Development Plans (DEDPs) which will sit underneath them. They will set out the overall goals of each of the proposed DEDPs as well as the timing and sequence for the preparation of these plans. A number of DEDPs are already in place. Once the RTPs are in place by Q4 of 2021, they will become primary reference documents to inform Fáilte Ireland's submissions on County and City Development Plans. This will ensure that submissions on County and City Development Plans are informed by a strong regional context in addition to the agreed tourism needs of each county or city. The Local Authorities will be consulted on the preparation of the RTPs which will also be subject to Strategic Environmental Assessment.

In addition to the experience brands, a dedicated business tourism unit works under the brand **Meet in Ireland**.



Fáilte Ireland's Business Tourism Unit works in partnership with Tourism Ireland and Tourism Northern Ireland to develop Ireland's full potential as a business tourism destination. With an international remit, the focus is to encourage and support both Irish and International businesses to host their International Association Conferences, Corporate Meetings and Incentive Trips in Ireland.

2.2 WAW OVERVIEW

Established in 2014, the Wild Atlantic Way has captured the imagination of visitors both home and abroad. This is very much testament to the strong partnership between our industry and the Wild Atlantic Way team in Fáilte Ireland.

2021 will see Fáilte Ireland publish the five year regional development plan for the Wild Atlantic Way 2021 - 2025, outlining how it will grow the visitor economy of the region in a sustainable manner for the benefit of all stakeholders. Integral to this will be devising Destination Experience Development Plans (DEDPs), which are currently being developed all along the West coast.

These are five year commercially focused destination development plans, which bring the public and private sector together. These plans bring together the public and private sector in a collaborative and progressive framework, with the aim of driving visitors to lesser known areas and attractions. They aim to encourage visitation in the off-peak, thereby increasing dwell time and revenue, without compromising the environment or culture of the region.

The themes of the plans have been designed to enhance each area's strongest tourism assets and appeal to core overseas markets. Vitally, these plans will be delivered in a way that encourages visitors to spend more time in an area, without compromising the environment or culture of the region.

The key development focus areas of the KDEDP are;

- Deliver a Destination Experience Development Plan as a five year destination development plan for Killarney.
- Develop a new destination brand proposition for Killarney supported by a brand toolkit to be adopted by all the tourism industry ensuring a consistent approach to destination marketing.
- Ensure the local experiences are brought to life through the development of the optimal mix of hero and ancillary products that get people into the area and retain them to increase dwell time.
- Unlock the economic growth potential of Killarney by progressing a range of key destination initiatives that will motivate tourists to visit and stay in the local area.

- Develop a sustainable basis for commercial development centred on creating strong signature, supporting and ancillary experiences that are commoditised through the creation of saleable experiences that excite consumers and buyers alike.
- Create the conditions to encourage international visitors to immerse themselves actively in the locale, interact with people; engage the senses by getting active in nature; attend festivals; learn the history and stories of the places; and enjoy the food and entertainment on offer. The focus is to deliver memorable moments that inspire tourists to not only share their experience with others but also make them want to return.
- Develop Killarney as a tourism destination which is “accessible for all”.

2.3 HOW THE PLAN WAS DEVELOPED

The KDEDP was developed through an extensive programme of consultation, research and international best practice review.

The research methodology employed a bespoke experience and destination research framework, devised to examine current destination experiences, project development considerations and opportunities, destination capacity assessed versus international best practice.

This was further supplemented by a programme of research within the destination, including group and individual consultations, workshops, mystery shopper visits by international and domestic visitors, international consumer assessment, social media analysis and online reviews of the destination.

An analysis of international best practice was undertaken to examine comparable themes or destinations that adopt a comparable strategic approach that is proposed for development within this plan. The core objective is to identify their success factors and apply the learnings to the project.

The programme of research specifically included the following;

- Hosting of the project initiation workshop attended by representatives of key stakeholders and tourism industry.
- Mystery shopper programme across all stages of the visitor journey from pre booking to in-destination.
- Visitor experience product audit for Killarney.
- Review of online share of voice and consumer sentiment to destination through a programme of ‘digital noise’ assessment.
- Programme of research conducted tour operators involved in the MICE and Leisure sectors.
- Examination of online saleable experiences available in destination and associated distribution channels.
- International benchmarking against comparable destinations with a similar product base and thematic approach to experiences.
- Programme of secondary research reviewing existing tourism and economic development plans.

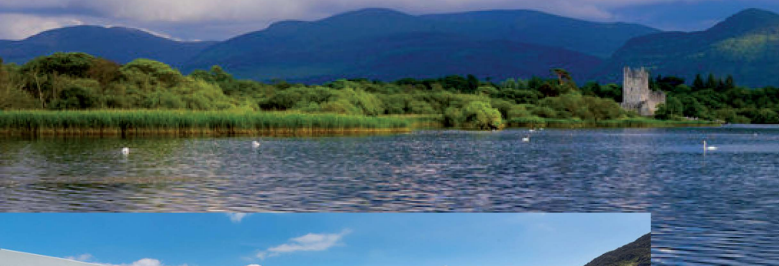
- Series of one-on-one industry consultations and onsite visits throughout the destination with tourism industry and other key stakeholders.
- Tourism industry workshop to agree, finalise strategic focus and secure industry commitment to the process over the next five years.

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SECTION THREE
Where We Are Now

3.1 KEY INSIGHTS INFORMING OUR ACTIONS / RESEARCH OVERVIEW

INTERNATIONAL BENCHMARKING

A programme of international benchmarking was undertaken to assess Killarney against a number of international destinations with comparable profiles and industry development focus. The three areas examined with the international benchmarking process included;

1. Muskoka, Lake Country of Ontario, Canada ('Create an excitement that inspires visitors to choose Muskoka first and often as Ontario's most experiential destination.')
2. Jackson Hole, Teton County, Wyoming, USA ('A world leader in responsible tourism, dedicated to developing a healthy and vibrant spring, autumn and winter economy that preserves our natural capital and enhances the wellbeing of our community')
3. Bregenz and Bregenzerwald, Vorarlberg, Austria ('Guided by an ethos of Nature and Living')

Key Learnings Applied to Killarney

The key learnings are organised under five headings with innovation embedded into each aspect of sustainable destination development as reflected in:

1. Positioning
 2. Product
 3. Organisational structure
 4. Community engagement
 5. Talent development
1. **Positioning**
 - Ensuring that there is a clear, ambitious and unambiguous vision with a strategy and action plan for the destination based on a sound understanding of market strengths and the destination resources and aligned with the national tourism strategy;
 - Having a clear and agreed position in the international marketplace that is truly reflective of the core assets and touristic appeal of the destination;
 - Harnessing the power and the potential of the international profile of Killarney achieved through a strong brand proposition and supporting destination brand programme.
 - Agreement amongst all stakeholders across the destination on a set of metrics that will measure sustainable development and the overall success of tourism in the destination at the end of the five year period.
 2. **Product**
 - Ensuring that there is a commitment to the on-going development and investment in high-quality, innovative, products and experiences that can add value and deliver a competitive edge to the appeal of the destination;

- Creating networks representing different sectors, interests, products and disciplines to collaborate in order to identify and deliver new, market-ready, products and experiences;
- Ensuring that all aspects of destination development are sustainable and deliver the agreed outcomes of success for the destination and the community as a whole;
- Creating visitor experiences that will command high value, deliver year-round tourism and contribute to the unique appeal of the destination.

3. Organisational structure

- Establishing an appropriately structured and resourced organisation to deliver the destination vision, strategy and action plan;
- Ensuring that the organisation has a strong leadership and an acceptable representation reflective of the needs and aspirations of all stakeholders;
- Developing sustainable and appropriate flows of revenues and access to capital finance to ensure that the strategy and action plans can be delivered;
- Undertaking regular and frequent analysis of the competitor set and benchmarking against a relevant group of other destinations;
- Undertaking the collection and analysis of market information and intelligence and acting upon the findings.

4. Community engagement

- Ensuring that there is community support for the sustainable development of tourism in the destination through regular and appropriate consultation;
- Delivering shared wealth and benefits to the wider community as a result of tourism development;
- Creating opportunities (jobs, business ideas and shared facilities) for members of the local community;
- Promoting a better understanding of the role and benefits of tourism to the local community and their political representatives.

5. Talent development

- Investing in the development of skills and talent of those working in the tourism industry and those that wish to work in or alongside the industry;
- Establishing a community and industry leadership programme;
- Creating initiatives to help attract and retain talent in the destination as a result of tourism;
- Providing stakeholders with access to expertise and training to develop innovative and creative visitor experiences.

TOUR OPERATOR DESTINATION RESEARCH

General Observations

- The tour operators' feedback focussed on the wealth of natural assets adjacent to Killarney and the sense of a 'bucket list' destination for their clients. The destination continuously surpasses visitor expectations due to the quality and variety of the scenery of the area.
- However, the consensus among respondents was that the 'new story' of Killarney is not being told in the marketplace. A number of respondents recommended a focus on educating the next generation of product buyers, while developing a consistent tourism narrative that needs to be adopted by all.
- Killarney is currently not perceived as a destination aligned to the Wild Atlantic Way proposition.
- In terms of future development focus, tour operators recommended (a) the expansion of new visitor experience options and (b) address the wider infrastructural challenges around traffic and access.
- The perception around the distance to Killarney and ease of access to the destination was highlighted as a challenge to overcome in the marketplace.
- The operators agreed the market perception of Killarney is one of a great destination for the outdoors experience. However, this is impacted by the sense of a 'long transfer' to get to the destination.

Leisure Operator Comments

- Killarney is seen as good value for money and on a par with Galway, Belfast and Cork but considerably better priced than Dublin.
- Accessing local culture is seen as a major gap as clients love to 'touch and feel' and become immersed in authentic 'behind the scenes' experiences where they can meet the locals and learn the story behind the musicians or entertainers.
- Seasonality is an issue highlighted by the tour operators who noted that 'winter time can be a challenge' and that 'it feels like Killarney shuts down' in the winter months.'
- The common perception is that popular activities are "jam packed" in Summer.
- There was a view that there isn't much to offer visitors on a rainy day.
- Clients want more than sitting on a bus, so experiences are really important to their ability to sell Killarney to clients.
- For leisure visitors, the Ring of Kerry is on most of USA/Canada visitors "bucket lists".
- Apart from jaunting carts and Muckross House, there is insufficient awareness around Killarney National Park and how to engage with the park.
- A number of operators mentioned that Killarney is not highlighting its outdoor and adventure activities enough and could do more.
- Shopping experiences need to have more variety and include more "local craft" focused offerings.
- There is a need to create a greater marketing awareness around "Winter" offerings in Killarney, both to domestic and international markets, particularly Christmas markets and other festivals and events happening in Killarney from October to March.
- The tourism industry should aim to expel the Killarney "shutdown" perception that people might have for off-season period.
- Operators recommended that local shop owners should be encouraged to sell more local and unique art, craft and design or offer more personalised Irish shopping experiences and create opportunities to meet with locals.
- A number recommended the need to develop improved "Foodie Experiences" or possibly greater awareness on what is already available. Arrange a Killarney "Food

FAM” to Dublin, Belfast, Galway to seek out what the competitor cities are offering in terms of “Foodie Experiences”.

MICE Operator Comments

- The average dwell time for MICE groups is four days while FIT and leisure groups tend to stay for two to three days suggesting Killarney needs to expand its product range to appeal to more MICE groups.
- Killarney is seen as a perfect incentive destination. It matches the Ireland “postcard” image that clients have before arriving to our country.
- USA Clients’ perception is that Killarney is a beautiful, breath-taking destination but a long transfer from Dublin or Shannon.
- European clients’ perception is that it is a great destination for outdoors and adrenalin activities but also a long transfer.
- The local atmosphere in Killarney exceeds their clients’ expectations.
- ‘For North American and European clients, the perception for those that are familiar with Ireland is ‘What’s new’? Killarney is tried and tested, but there is nothing much new to offer. For anyone who is not familiar with Ireland, Killarney takes their breath away, in particular the lakes and mountain elements.’
- It is also suggested that there isn’t much to offer on a ‘rainy day’ with very limited team building facilities, activities or experiences to offer MICE groups.
- According to MICE operators, the view was that accommodation in Killarney is considered more affordable than Dublin or the Shannon Region in terms of 5-star options but there are not enough 5-star hotel options for luxury FIT travellers or large incentive groups.
- There is a lack of awareness of Killarney National Park while historical locations and stories in general are underutilised according to the operators, both as stand-alone experiences as well as potential cultural evening venues.
- Tour operators also highlighted that there is insufficient and a lack of new high-end food offerings as evening options for visitors were confined to the same restaurants and the offering has not really changed in years.
- According to tour operators, Ireland is going through a food renaissance, but Killarney is not in keeping with other towns and cities which have established tours. There is a need for enhanced high-end product and food experiences that recommend more local restaurants, pubs and hotels, and to partner with local suppliers to create more ‘foodie experiences’ e.g. foodie tours.
- The variety of evening economy activity needs development with suggestions including developing a distillery or craft beer venue that could host events to include entertainment while more banqueting options are also required.
- The MICE Product has not changed too much over the years. DMCs felt they have had to reinvent it for themselves to create some new activity ideas.
- It was felt that there are not enough team building facilities, activities or experiences to offer MICE groups.
- In terms of the evening economy, for incentive groups on a 3 to 4-night stay, evening options are limited. The offering has not really changed in years. The same restaurants are looking after visitors, but not many new offerings for high end clients.
- The key attractors for Killarney as a MICE destination include its scenery and proximity to well-known experiences such as Ring of Kerry, Gap of Dunloe and now the Star Wars connection. It possesses a number of very high-quality hotels and matches the postcard image people have of Ireland. A number mentioned it possesses a uniqueness and authenticity... different to anywhere else.

- There is an immediate opportunity to provide additional exceptional “experiential” offerings for luxury FIT and MICE visitors to Killarney.
- Adapt the current MICE product offering to suit a younger MICE buyer audience that are coming onboard and looking to Ireland as their next incentive destination.
- The destination should look to make at least one historical building in Killarney available as offsite evening venue for large groups or MICE clients.

KILLARNEY TOWN AUDIT

A town audit was conducted in Killarney adopting the thirteen criteria employed by Fáilte Ireland in assessing Destination Towns. This topline assessment provided a consistent framework for assessment with other urban destinations and alignment with best practice for urban tourism development.

The key outcomes of the town audit process were allocated across the areas where the town is performing well, areas with immediate development and growth opportunities and aspects of the town identified as areas for future development.

The key areas of strengths included the variety and quality of the accommodation base. The town scored strongly for festivals and events particularly events that have international visitor resonance. The impact of the Killarney Purple Flag endeavours has contributed to the creation of a safe destination profile, supported by the quality of visitor services across the town. The efforts of the community through organisations such as the Tidy Towns and the work of the Local Authority in delivering sustainable practices within the town represent a strong area of delivery, with even greater potential to be achieved in this area.

The audit established a number of areas with immediate development opportunities. These were recognised in the audit process as being satisfactory with scope for further improvements. The areas included;

- the range of things to do and see in the daytime.
- attractiveness of the town.
- food, drink and retail options for visitors.
- Despite the perception that there are plenty of evening time options, the audit highlighted a limited range of evening economy activities.

The audit established a number of areas for development for Killarney under the criteria employed. The four areas included town access, orientation and signage, and the quality of the public realm from a visitor perspective requires development. The opportunity to engage the visitor through local stories and history interpretation, storytelling and animation was also highlighted for development. The wider Killarney message through destination marketing and visitor awareness was rated as an area of weakness requiring development focus.

MYSTERY SHOP

A series of mystery shop visits were undertaken to examine the visitor journey from pre booking to the experience delivered in Killarney. A number of visitor scenarios were examined from pre visit enquiries for groups and destination recommendations to in-destination visits by mystery shoppers. The mystery shoppers were representative of key visitor segments i.e. culturally curious and great escapers.

Mystery Shop Key Learnings - Pre-Visit

- The Mystery Shopper's accommodation providers research indicated that the overall willingness to engage and response times were good, with the majority responding within three hours of the enquiry.
- The providers' main focus was on availability, exact dates and securing a booking. Many requested exact dates without offering reasons to stay longer. Only one provider suggested that a timeframe of at least 3-4 days was needed to experience Killarney.
- The culture among providers appeared to be "we can help them more when they get here" rather than working to suggest pre-booked schedules for visitors.
- The majority of providers did not make any reference to evening or night time activities or entertainment despite being asked for that information in the request.
- The Wild Atlantic Way was not mentioned by the bulk of providers in their responses.
- The majority of responses gave fairly standard generic information on daily tours and popular attractions. Two providers gave excellent responses and included information on Falconry Hawk Walks, Clay Pigeon shooting and guided walks, mountain skills, rock climbing, kayaking and fishing.
- There was very little pre-visit evidence of collaborative offerings with tour operators and not enough of a push on adventure tourism for such a magnificent natural hosting ground.
- Websites designed to publicise Killarney and/or specific attractions require a more collaborative approach to promotion and cross referencing to other experiences. An increased focus in on-line booking capacity, links to attractions and an overall storyline that ties the overall tourism package together is required.
- One official website for Killarney that allows online booking and utilises scenic imagery is recommended as it is difficult to plan a Killarney itinerary as an FIT or an independent group because too few activities and experiences are bookable in advance.
- Links to Ireland's story as well as regional stories and brands (The Wild Atlantic Way and Kerry) need to be clearer and more fully integrated into on-site storytelling.

Mystery Shop Key Learnings – On Site Visit (In destination)

- From the Mystery Shopper experiences, there appeared to be insufficient knowledge among front of house staff on available Killarney experiences beyond immediate recommendations to a number of scenic areas.
- An example of failing to match visitor expectations with experience delivery was evident through one outdoor activity offering that provided no changing areas, resulting in the Mystery Shopper changing on the mini bus which is not conducive to providing a world class destination.
- The visitor requires more support to access stories about the active rather than passive encounter with Killarney – messages around activity experiences needed to

be integrated more emphatically into all aspects of marketing, as well as availability on the ground.

- There was also a sense locally that most attractions/experiences are dependent on weather but as one Mystery Shopper noted ‘The weather didn’t put us off the attractions the people did.’
- Signage was considered limited and, in some cases, in need of upgrading, particularly within the town centre. There is no coherent linking of the town to the National Park and vice versa through signage and orientation structures.
- It was also noted that there are very mixed retail experiences on offer in the town centre with plenty of generic ‘tourist shops’ but no easily accessible local craft shop.
- A family Mystery Shopper noted that ‘Killarney had more to offer than what they were referred to in terms of key attractions, activities and things to do.’ They also felt that there were times when the referral was not considered for them in terms of being age appropriate. Often frontline staff are young and recommend their own preference instead of customising their answer to suit the audience e.g. dinner recommendations for a family suggesting a need for greater training.
- There were other instances when a Mystery Shopper specifically asked to go to see particular attractions and was deterred by staff who lacked any level of awareness of the product and recommended unsuitable alternatives.
- Killarney House was never suggested by any hotel, restaurant or attraction staff as a place to visit despite the scale of investment at the site. The onsite visitor interaction at Killarney House and Gardens was viewed as exceptional at all stages of the visit.
- There was little publicity of what there is to do in the evening apart from pubs and restaurants while in the destination.
- One Mystery Shopper was surprised that at no stage of the in destination visit, were they asked or prompted to promote their experience on any online channels. This was despite providing very positive feedback to a number of accommodation, experience and attraction providers.

DIGITAL NOISE

- The sentiment analysis of social media posts generated by Killarney is largely positive, with almost two-thirds of posters, with a reach of 330,000 users, conveying a positive image of their holiday experiences. Only 3% of the analysis revealed any degree of negativity.
- Posts are dominated by Killarney’s natural beauty most notably Killarney National Park, the Ring of Kerry, nature, hiking adventures, lake, waterfall and photography being the predominant hashtags. The enchantment of Killarney’s ‘great outdoors’ through predominantly gentle exertions is also central to imagery and posts throughout all digital platforms. However, there is very little imagery of the town itself.
- #lovekillarney is the most common hashtag used in relation to the destination on Twitter and Instagram, with 53,000 posts on the latter alone signifying the collective benefit of promoting a singular social media tagline.
- There is little reference to evening economy experiences (food, pub, music or local culture) on posts, with very few food recommendations for Killarney itself in comparison to other destinations in Kerry.
- Despite the ‘outdoors destination sentiment’, there is limited sharing of immersive experiences and no social media posts that portray the sense of town or local culture.
- There is a lack of industry collaboration across the destination. There is no adoption of a collective approach to avail of the potential reach of social media for the town and international profiling of local experiences.

3.2 SITUATIONAL ANALYSIS – SWOT ANALYSIS

Strengths

- Historical capital of Irish tourism association and international positioning as must visit destination.
- Uniqueness of urban setting adjacent to a National Park, ‘the Town with a National Park’ and proximity to stunning natural environment.
- Portfolio of built and natural heritage assets from Muckross House to Killarney House set in the National Park.
- Quality of tourism industry professionals across all industry segments.
- Quality and diversity of accommodation stock.
- Internationally recognised visitor destination and “must visit” destination.
- Capacity to cater for all levels and volumes of business tourism.
- Reputation as a lively and vibrant evening destination.
- Quality of leisure product mix e.g. outdoor activity and adventure base.
- Accessibility of Killarney to all other major destinations and Wild Atlantic Way as a hub for touring and exploration.
- Quality of relationships with tour operators and level of international programming of Killarney.
- Long established appeal of Killarney to domestic and overseas visitors.
- Ability of Killarney to cater for all visitor segments of all ages and stages.
- Culture of industry collaboration across the destination.
- Quality of festivals and events delivered throughout the year.
- Proximity to international airports.
- Capacity to cater for outdoor activity demand based on experience and expertise.
- Accessibility to iconic outdoor experiences, walks, Killarney Lakes, Carrauntoohil, Torc Waterfalls.
- The embrace of tourism by the community and community pride in its national tourism positioning.

Weaknesses

- Market perception of the current Killarney brand e.g. perceived as a USA visitor centric destination to possible exclusion of other source markets.
- The need to adapt and address the changing nature of tourism, visitor preferences and the motivations for younger markets i.e. millennials.
- No coherent destination brand adopted by the tourism industry.
- No strong call out of the National Park proposition linked to the town experience and limited integration of the urban and natural environment experience.
- Limited night time economy offering outside of focus on entertainment provided in licenced premises.
- The requirement to address current UK and other European market targeting, with Killarney not currently featuring as a destination option in certain key markets.
- Market perception around Killarney as not being a price competitive destination and offering low value for money.
- Lack of an indoor product of scale that is motivational for visitors across peak and shoulder seasons and supporting the evening economy.
- Limited accessibility to programmed cultural events throughout the season.

- Limited range of retail outlets and lack of diversity among existing retailers.
- Challenge of the market perception that Killarney is always too busy.
- Destination challenge of issues such as seasonality and staffing.
- Lack of a sense of place or definition around the story of Killarney through linking and integration of natural assets, public realm, open spaces.
- Quality of visitor orientation and ability to link town and natural environment experiences.
- Addressing the day time economy to develop business for Killarney between 12pm and 4.00pm.
- Lack of a consistent and cohesive communications approach adopted by the local tourism industry.
- Limited access to unique food experiences in Killarney and high end dining.
- Challenge of traffic management and negative perception associated with traffic issues.
- Accessibility to destination is perceived as challenging through existing regional road infrastructure and rail options directly to the town.
- Position versus Dublin market in developing MICE sector.
- Lack of a gala dining venue for the MICE market.
- Industry training around product and experience knowledge to share with visitors.

Opportunities

- The establishment of a world class destination proposition through the outdoors and natural environment supported by advancing the National Park masterplan to deliver world class visitor experiences.
- Leveraging the visitor potential of the National Park and the uniqueness of the 'the town with a National Park' proposition as a key USP.
- Ease of access to outdoor activity experiences.
- Maximising the opportunity that Killarney House and Gardens offer linking the town with the National Park.
- Product development that offers visitors access to great Killarney experiences 365 days a year.
- The enhancement of existing and development of new Festivals and Events to create a market ownership of key calendar periods e.g. March festival, Christmas in Killarney, Great Outdoors.
- Development of the MICE business opportunity.
- Development of a large scale indoor visitor attraction for Killarney.
- Development of the existing trails / loop walks to integrate the town with the National Park e.g. *Lough Leane Loop* Trail Project.
- Development of a destination Food Experience approach through food trails, events and locally immersive food experiences.
- Development of a gala dinner venue for MICE tourism.
- Leverage off the Wild Atlantic Way opportunity as an exploration base.
- The development and implementation of a coherent destination brand for the Killarney experience, communicating the essence of the outdoors experience and the urban visitor environment.
- A sustained and collaborative communications approach to profile what is on offer in Killarney, educating the local tourism industry and visitors.
- Development of a more coherent visitor experience pathway through an improved online booking and information system across the tourism industry and development of social media profiling opportunities for the destination.

- Creation of a series of evening economy experiences for all ages with particular focus on the 6.00-9.00pm evening segment through new cultural venues.
- Creation of an integrated public realm approach linked with open / public spaces telling the story of Killarney in new engaging ways linking the natural environment with the urban experience.
- Ireland's leading sustainable destination guided through environmental best practice proactively adopted by stakeholders.
- Adopting a leadership role in Tourism for All and accessibility approach for the industry.
- Visitors seeking deeper experience through local stories and environment.
- Increasing and promoting environmental enhancement through a sustainable tourism approach

Threats

- Tourism industry disruption and pace of recovery due to global Covid 19 pandemic.
- Market positioning of Killarney and brand associations.
- Accessibility challenges posed by road, rail and air access to the destination.
- Emerging national destinations becoming increasingly competitive.
- Failure to create new experiences viewed as iconic in destination.
- Threat of global shocks potentially affecting key markets e.g. USA, mainland Europe.
- Requirements to balance environmental objectives versus creating new visitor experiences.
- Environmental degradation of popular amenities through challenges of climate change.
- Challenge facing regional tourism destinations arising from Brexit and its impact on the UK and European markets.
- Failure to create new innovative experiences that entice programming of the destination by specialist overseas operators for leisure and incentive/business.
- Possible lack of funding restricting iconic sites from fulfilling their potential for sustainable tourism development.
- Increase in visitor numbers with potential to disturb or damage the natural environment.

3.3 KEY CONCLUSIONS BASED ON RESEARCH

1. Tourism Asset Maximisation

World class amenities such as the Killarney National Park and Killarney House and Gardens have the capacity to deliver more for the overall Killarney experience. In achieving a new vision for the town, integrating the urban with its natural setting, the amenities must become central to the new Killarney story and the narrative increasingly demanded by the marketplace. This will align with global visitor trends demanding active outdoors and unique natural experiences while also influencing key industry decision makers i.e. tour operators. Notwithstanding the desire to maximise the potential of the beauty of the National Park, the future focus on sustainable and responsible tourism will determine the approach required to align with the delivery of the National Park Masterplan. The National Park remains an international USP in the context of building on the world class destination opportunity and must be a key focal point for the emerging destination brand and the experiences it can deliver.

2. Experience Development Focus – Day and Evening Economy

There is widespread recognition of the many ‘hero’ experiences that exist in Killarney. There is equally a strong sense that the town and its surrounding environs needs to develop an extended range of new or regenerated ‘saleable’ experiences. The town possesses a rich portfolio of natural and built heritage assets. However, experience innovation is limited. Ease of access to experiences that bring the existing tourism assets ‘alive’ through immersive experiences are difficult to access. Equally, local industry collaboration on experience development does not exist to any significant level i.e. co-create extended itineraries through product and experience collaboration.

The delivery of a new ‘Killarney Story’ needs to be told through the creation of saleable experiences that will build the destination narrative. This is the narrative that will feed off the adapted vision for Killarney to become a world class destination. In developing an outdoor visitor proposition, the promise of an activity destination must be matched with accessible experiences and supporting infrastructure to deliver best in class experiences. In the absence of a new approach to enhancing the existing or developing new visitor experiences, the destination will be challenged to remain competitive in a fast changing and competitive marketplace.

3. Rooted in Tourism Heritage – An Outdoors Base

The deep-rooted association of Killarney with the outdoors and activity highlights the credibility in advancing the international profile of this product segment. The history of activity innovation that started through Muckross House and Killarney House and Gardens provides the historical basis for the town to evolve as a major international outdoors activity base. International demand for sustainable, active and outdoor focused destinations suggests a greater level of focus in this area for Killarney. It will require investment in creating accessible outdoor experiences with an improved activity infrastructure to become more competitive as an international outdoors destination. This must also link to the wider activity base across the county of Kerry, positioning itself as the exploration hub for adventure and outdoor activity. Future product development must be aligned with this vision and future capital investment directed to support this ambition. The development of the next ‘iconic’ outdoor experience should remain a key focus for development. The future focus on the

outdoor 'product' and experience will provide Killarney with the most immediate opportunity to react to global tourism trends and build a portfolio of quality experiences that will work to develop the town and industry base as a year round destination.

4. Building on the Wild Atlantic Way Opportunity – a Hub for Exploration.

Killarney's profile as a touring base and hub for exploration must be developed with a greater level of adoption among the industry of the international Wild Atlantic Way opportunity. The creation of a base and hub focus for the Wild Atlantic Way has the ability to extend the season and promote increased collaboration with experience providers across the county, with the objective of increasing dwell time in the area. The impact of Killarney tourism on the wider Kerry destination is widely recognised. However, more alignment with the Wild Atlantic Way has further capacity to address the challenges of seasonality, length of stay and experience development with Killarney as a central base for visitors. A new focus on itinerary and packaging development is required, integrating the town experiences with the wider county experiences that position Killarney as the hub for exploration.

5. Industry Development – Developing Experience Capacity

The research and consultation phases identified a number of gaps to address in future destination development. Industry product knowledge, capacity to pre-sell experiences and create new experiences remain challenges to address. The ambition to become world class must be matched with a destination that is fully functioning all year round. It must continuously strive to deliver a best-in-class visitor experience. Adapting to future tourism trends, target new audiences and source markets while meeting the needs of key buyers must be at the forefront of future planning. The development of a new industry/business training focus is required. Experience development remains central to the strategic destination development approach. Equally, the fundamentals of meeting visitor expectations at every stage of the visitor journey, from pre to post visit must be addressed through industry capacity and capability training.

6. Masterplan Approach for Tourism Leadership

Killarney remains an iconic destination with strong international appeal. The research has highlighted a number of challenges in the context of being fit for purpose to meet emerging global tourism trends and meeting the needs of the key product buyers. There is an agreement that a new Killarney story needs to be told, while enhancing the many motivational assets it currently possesses. It must masterplan for success and link the community, town, tourism industry, stakeholders and brand in all future tourism planning and development.

The adoption of an agreed vision supported by a consistency in the destination brand, brand narrative and experience development are central to future success. Killarney's national tourism leadership position must embrace new tourism challenges and lead in the delivery of the next generation of tourism development. It will need to create sustainable destination differentiation through its approach to responsible tourism, accessible tourism for all and sectoral development of outdoor activities and business tourism. Each of these areas require a new focus on the in-destination visitor experience through town and product enhancement, reflecting Killarney's capacity to continuously innovate while achieving industry leadership.



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SECTION FOUR
Killarney Destination Experience
Development Plan

4.1 THE PLAN & OBJECTIVES

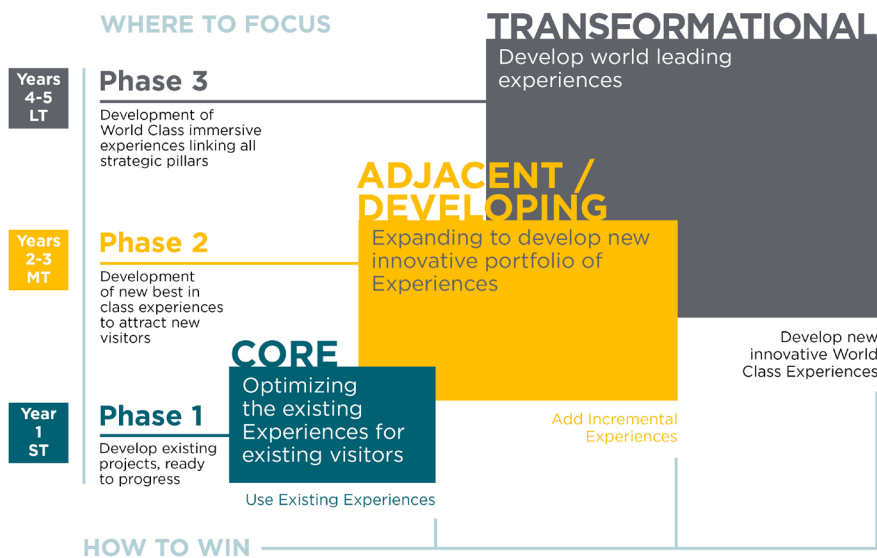
The KDEDP is a five-year destination development plan designed to guide tourism development through a roadmap of key projects. The projects will be adopted by all stakeholders in the pursuit of sustained tourism growth and the achievement of a new destination vision for Killarney in the development of a world class destination. The plan is designed to foster increased levels of collaboration among all stakeholders. It will provide the development focus to deliver the 'Killarney Experience' to achieve the key economic and destination objectives of season extension, increased revenue and employment growth.

The key objectives are as follows.

- Deliver the vision for Killarney in becoming a world class destination strongly differentiated through the integration of its stunning natural environment with a quality urban experience.
- Provide a short to medium term focus for post COVID-19 recovery while building resilience in the long term through a new strategic destination development approach.
- Develop a coherent destination brand approach communicating the Killarney visitor experience, building on the essence of the place, its people and status as a base and access point to the Wild Atlantic Way.
- Grow the economic impact of tourism activity through season extension and extending the length of stay in Killarney.
- Leverage the visitor potential of the National Park and the uniqueness of 'the town with a National Park' experience proposition as a key USP for domestic and international visitors.
- Develop a coherent visitor experience pathway that aligns all members of the tourism industry to deliver great Killarney experiences and ensuring consistency across the destination.
- Maximise the Wild Atlantic Way opportunity for Killarney and the positioning of the town as a key exploration base for the wider Kerry visitor experience.
- Promote tourism vibrancy throughout the town through enhanced visitor flow and orientation throughout the town, its facilities and surrounding amenities.
- Address the challenges of evening economy provision while increasing the range of things to do during the day.
- Maximise the capacity of the town as a leading business tourism / MICE destination.
- Develop the opportunity for the destination through the hosting of leisure and business events.
- Work with the tourism industry to improve their capacity to deliver new and enhanced experiences and product / experience knowledge within the destination.
- Protect, sustain and enhance the natural environment of the Plan area.
- Develop Killarney as a tourism destination that is "accessible for all".
- Contribute to sustainable destination development through the adoption of the VICE model as international best practice proactively embraced by all stakeholders.

4.2 KILLARNEY DEDP APPROACH

Over the five years of the KDEDP, the strategy is to enhance the existing core visitor proposition building towards the longer term development of world class visitor experiences. It will support the ambition to become a world leading destination harnessing the town’s unique stories, status as a major tourism hub and base for accessible outdoor experiences. It will support the telling of the Killarney story through world class immersive and fascinating experiences for visitors.



In order to achieve the strategic objectives of the KDEDP, the framework is structured around three interdependent layers of activity. They include;

- A: Long Term: Achieving the destination transformational ambition through the delivery of catalyst projects
- B: Strategic Development Pillars - Create the conditions for enhanced experience development through five strategic development pillars
- C: Destination projects that build on the existing portfolio of civic, built and natural heritage assets

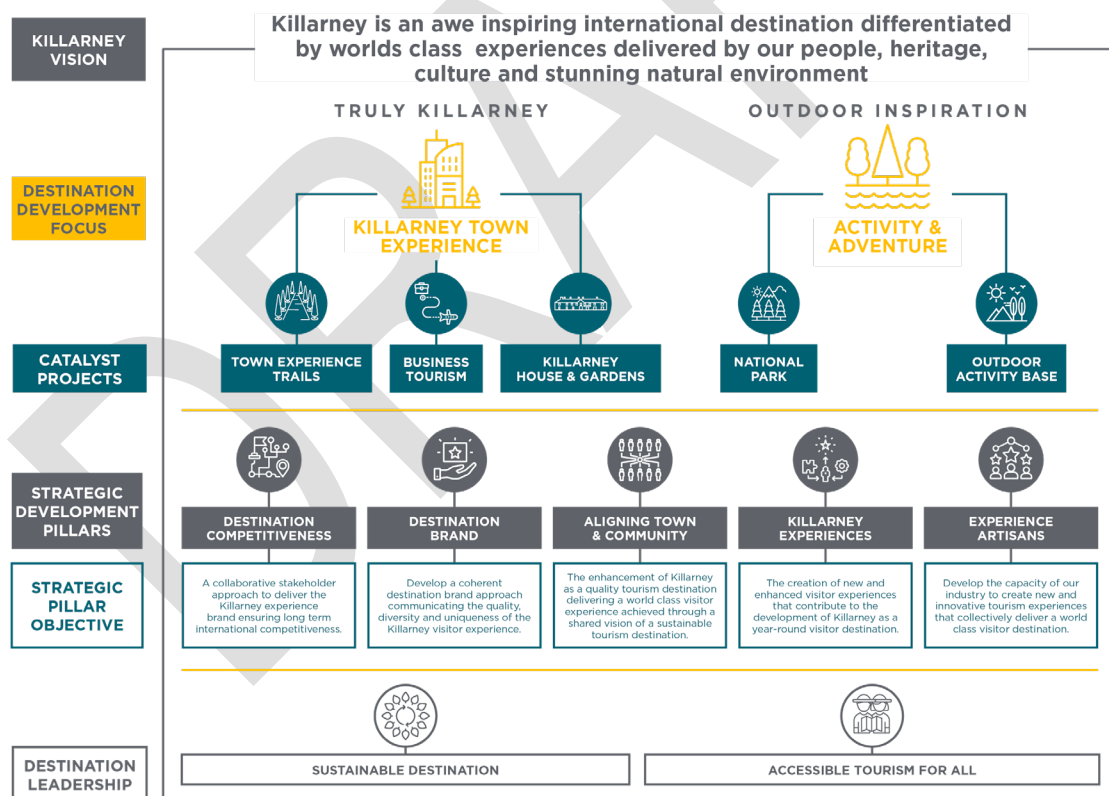
This phased development approach is based on optimising the current visitor experience asset base and working with all stakeholders to develop or enhance new saleable products, leveraging off these existing experiences. Over the longer term, a number of transformational projects will be developed (i.e. catalysts projects) that will harness the existing product base and create the scale required to deliver a sustainable destination approach. They will create a focus for development among the tourism industry and are designed to expand the experience product base. The transformational projects approach is designed to link the key elements of the KDEDP to achieve the destination vision, while providing a platform for all stakeholders to embrace in the creation of a world class Killarney experience.

The KDEDP model is based on achieving a world class destination of the future. The development focus is to enhancing the town experience blended with the adjoining national

park experience. It is designed to maximise the natural beauty of its surrounds while creating an exploration hub for the wider Kerry and Wild Atlantic Way experiences.

The strategic pillars and development focus themes are designed to provide the basis for a coherent industry approach to experience development. The strategic pillar themes will ensure a consistent development focus for the 'Killarney visitor experience' while influencing future 'product' creation. These are supported by a series of identified projects that are adopted by stakeholders for delivery and will act as strategic enablers and accelerate the destination capacity, product base and collaboration to deliver world class Killarney experiences. Underpinning the strategic destination projects is a new focus to create destination leadership in developing a destination for the future. These are projects designed to impact on all future development activity and will be embraced by all stakeholders. The destination leadership projects will focus on accessible 'tourism for all' and responsible and sustainable tourism.

In order to achieve the strategic objectives of the KDEDP, the development plan framework is structured around a number of interdependent layers of activity. These provide a distinct development focus for the plan aligned with achieving a collective vision for Killarney. This starts with the creation of five strategic development pillars for the plan. Each of these pillars contain a range of destination development projects designed to achieve the overall vision within five years.



The strategic pillars provide a focus on the key destination development principles of creating a great place to visit (town focus) while enhancing the existing and creating new visitor experiences to simulate 'product' supply. The capacity of the tourism industry will be

a key area of attention, enabling the Killarney tourism trade to satisfy the demand and supply conditions required for destination growth. The objectives of the strategic pillars focused on town, experience development and growing tourism industry capacity are all aligned with the pillar of ensuring destination competitiveness and the collective achievement of destination and brand growth.

Strategic Development Pillars - Creating the conditions for Experience Development (Developing New Experiences)

The implementation of the KDEDP is focused through the creation of a number of strategic pillars that support the delivery of a coherent development plan. They include;



These strategic pillars provide the framework for a series of projects viewed as potentially transformational. Their capacity to become catalysts for sustained growth will be achieved through collective delivery and the willingness of the tourism industry to embrace the opportunity each provides for the destination.

The strategic pillars provide a focus on the key destination development principles of creating a great place to visit (town focus) while enhancing the existing and creating new visitor experiences to simulate ‘product’ supply. The capacity of the tourism industry will be a key area of attention, enabling the Killarney tourism trade to satisfy the demand and supply conditions required for destination growth. Achieving the objectives of strategic pillars focused on town, experience development and growing tourism industry capacity are all aligned with the pillar of ensuring destination competitiveness and the collective achievement of destination and brand growth.

Achieving the vision through Catalyst Projects (Transformational)

The delivery of the vision for Killarney through a range of catalyst projects that include;



Implement the National Park master planning actions that encourage sustainable and responsible use of its natural resources.



Build the local capacity and conditions for Killarney to maximise the opportunity around outdoor activity and adventure that supports season extension.



Develop the Killarney Destination Experience through innovative orientation and waymarking approaches that will introduce visitors to the full range of Killarney experiences



Develop the competitiveness of Killarney as a national business tourism destination.



Maximise the potential of the current Killarney House and Gardens experience and future capacity for experience development

Destination Leadership Projects

Accessible tourism for all and sustainable tourism have been examined by the Killarney tourism industry as immediate areas for adoption. The desired focus is to progress these development areas beyond a functional level of compliance with industry standards and collectively embrace these themes as future points of international destination differentiation. These are identified within the plan framework as Destination Leadership Projects to be embraced across all stakeholders from the tourism industry, ancillary service providers, agencies and the wider community base.



Adopt an industry and community wide approach to becoming a leading international destination for responsible tourism.



Develop accessible tourism ensuring 'Tourism for All' in Killarney and developing the town as the leading national destination for accessible tourism.

4.3 DESTINATION PROJECT DELIVERY

Across each of the five strategic development pillars, a number of development projects have been identified. These are based on existing plans and areas identified as priority focus for the coming five years. These will support the delivery of the catalyst projects and contribute to achieving the vision for Killarney. They are focused on the development themes of 'Outdoor Inspiration' immersing visitors with the beauty of the area while accessing the unique local character and town experiences of Killarney i.e. 'Truly Killarney'. Collectively these will create the international Town with a National Park positioning supported by the delivery of new visitor experiences and an enhanced Killarney town brand proposition.

Strategic Pillar 1: Destination Competitiveness

1. Deliver a new Killarney business tourism strategy to address the challenge of seasonality in Killarney through enhancing its appeal to the MICE sector.
2. Examine the opportunity for a Gala Dining venue for Killarney to support the capacity of the destination to enhance its business tourism offering.
3. Create a sustainable Killarney festivals model supported by a dedicated festivals resources supported by a multi-stakeholder approach.
4. Maximise the towns capacity to attract and host large leisure and business events maximising their impact on the day and evening economy.
5. Support the continued development of the Purple Flag and its capacity to create a unifying engagement platform for the community and the tourism industry.
6. Adopt a new commercial growth planning approach through new levels of market diversification focusing on new geographic markets and appealing to new and growing market segments.

Strategic Pillar 2: Destination Brand

A collaborative stakeholder approach delivering a new Killarney experience brand to ensure domestic and international competitiveness.

1. Develop a new destination brand to create a singular branding approach supported by the narrative that defines the destination ambition for Killarney. This will be supported by the resources required for an international tourism destination brand approach with world class ambition.
2. Develop the historical positioning of Killarney as a tourism base and exploration base for the wider Kerry tourism experience.

Strategic Pillar 3: Aligning Town and Community

The enhancement of Killarney as a quality tourism destination delivering a world class visitor experience delivered through a shared vision of a sustainable tourism destination.

1. Enhancement of public realm introducing the visitor to the Killarney story
2. Development of Killarney Experience Trails to introduce the visitor to the full range of Killarney experiences that exist such as culture, heritage and food.
3. Development of a coherent orientation approach for visitors, aligned with destination brand development.
4. Place making signage – development of a consistent approach to orientation signage across the destination and the creation of a sense of place for Killarney through its signage and orientation from the welcoming signage to waymarking around the town.
5. Develop tourism ‘opportunity sites’ in the town with a focus on the sustainable economic development through tourism, addressing gaps in activity and attraction provision.
6. Develop Killarney Town story through creative place making and innovative approaches to interpretation.
7. Examine the potential to develop the quality and diversification of Killarney retail options through the development of a retail strategy for the town.
8. Develop the historic elements of the town centre as place making features through regeneration of the historic lanes.
9. Examine the opportunity to create a market area for Killarney with a town centre focus to house artisan produce and add to the diversity of retail experiences.
10. Develop a consistent approach to visitor trails that includes an innovative waymarking approach that introduces visitors to new Killarney experiences.

Strategic Pillar 4: Killarney Experiences

The creation of new and enhanced visitor experiences that contribute to the development of Killarney as a year-round destination.

1. Expansion of the arts and cultural experience provision through new cultural venues delivering day and evening time experiences.
2. Support the implementation of the Killarney National Park tourism masterplan to create new activity, heritage and cultural experiences through enhanced trails and visitor servicing.
3. Review of the facilities required in the creation of an activity hub or dedicated resources to support the activity providers in Killarney to underpin visitor engagement with the outdoors in a responsible manner.
4. Develop a new focus on food and drink experiences in Killarney and variety of quality dining options available to visitors.
5. Advance the requirements to create the Lough Leanne Loop.
6. Deliver on the potential of Killarney House and Gardens through a masterplanning approach from signage to use of additional on-site facilities as part of the visitor experience.
7. Examine the creation of living history interpretation in Killarney to bring the Killarney story alive to visitors.
8. Develop new Living Culture options for visitors to explore and experience the local authentic story through distinctly Killarney experiences.
9. Examine the feasibility of a new indoor visitor attraction for Killarney.

Strategic Pillar 5: Experience Artisans

Developing the capacity of the industry to create new and innovative tourism experiences to collectively deliver a world class visitor destination.

1. Develop the industry knowledge base through the development of a 'Killarney Concierge' model to create the structures to share experience knowledge across all visitor facing members of the tourism industry.
2. Create a new focus on evening economy experience development across Killarney.
3. Increase the number of bookable experiences available to visitors in Killarney across the day and evening economy.
4. Develop an industry wide approach to sustainable tourism that supports Killarney's ambition to be a world leading responsible tourism destination.
5. Develop the opportunity for accessible tourism in delivering 'Tourism for All' with Killarney as the leading national accessible tourism destination in Ireland.
6. Demonstrate destination leadership in engaging with digital platforms and technologies to connect visitor audiences with new and collaborative experiences.
7. Examine industry engagement platforms that link tourism providers in Killarney with Wild Atlantic Way experience providers to co-create new added value experiences on the Wild Atlantic Way.



WILD ATLANTIC WAY

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SECTION FIVE
Delivering the Plan

5.1 PLAN IMPLEMENTATION

The implementation of the KDEDP is based on stakeholder commitment to project delivery. Key stakeholders will take ownership or partner on the delivery of the key tasks required to implement the KDEDP. It represents a five-year operational plan creating a destination development focus for Killarney.

The KDEDP is designed to build on existing project plans and integrate all related activity for a coordinated series of outputs. These include projects that are being implemented, projects featured in existing plans and new concepts to build the destination's capacity for new visitor experience development.

The implementation phase is structured around an action plan approach. The framework adopts the VICE model as a means of measuring success and is applied to the operational framework for the KDEDP. This includes the measurement of projects that will enhance tourism industry capacity development, experience creation and enhancement, catalyst and destination enabling projects.

A list of actions relating to all proposed projects and strategic pillars has been devised. Each of the stakeholders listed below has been tasked with delivering on actions which will help to shape the plan and ultimately ensure the success of the project over the next five years.

Acronym	Stakeholder
KCC	Kerry County Council
OPW	Office of Public Works
DCHG	Department of Culture, Heritage and the Gaeltacht
FI	Fáilte Ireland
NPWS	National Parks & Wildlife Service
PS	Private Sector
KCB	Kerry Convention Bureau
KCTC	Killarney Chamber Tourism Council
KTIF	Kerry Tourism Industry Federation
IHF	Irish Hotel Federation
IVF	Irish Vintners Federation
LC	Local Community
LEO	Local Enterprise Office
HTI / HC	Historic Towns Initiative / Heritage Council
KETB	Kerry Education and Training Board
ITT	Institute of Technology Tralee

GUIDING PRINCIPLES

To ensure the successful implementation of the KDEDP experiences and the creation of a sense of place, the following guiding principles have been established to guide certain recommendations and projects listed in this section.

- All projects are self-sustainable, meaning they have access to capital and are not relying solely on grant aid to be developed or maintained.
- All projects are on-message with the KDEDP experiences and are aligned to the broader mission of the Wild Atlantic Way proposition and brand.
- All projects focus on setting the area apart from its competitors, contributing actively to creating a strong sense of place with a unique feel and ensuring visitor needs are catered for across the day and evening time.

- All projects add value to the area and provide a direct and demonstrable link to either extending visitor length of stay, extending the length of the tourist season or developing a new market.
- Principles of responsible tourism development are embedded in each action, creating better places to live in and to visit.
- All stakeholders will demonstrate a strong and sustained willingness to working as a collaborative network.

IMPLEMENTATION

The implementation of the KDEDP will be overseen by the creation of a working group. The KDEDP Working Group will operate until 2024. The KDEDP Working Group is tasked with supporting the following objectives:

- Support the delivery of the KDEDP.
- Drive growth as per the agreed KPIs in the action plan.
- Lead and manage the action plan ensuring alignment with the prioritisation and delivery of key projects.
- Creation of a representative area wide body which ensures that there is a mechanism in place that allows two-way communication between the implementation group and any sub groups which may be formed.
- Ensure that the catalyst and enabling projects support the delivery of experiences identified in the plan and are delivered within the five year timeframe.
- Provide a space where stakeholders can share new ideas with partners.
- Creation of a common tourism voice and a powerful tourism network that promotes each other's interests.

The KDEDP Working Group will represent key stakeholders and representatives from the area. It will be chaired by an independent chairperson with the ability to focus the group in the delivery of the actions required to implement the KDEDP.

FORMATION OF THE KDEDP WORKING GROUP (*to be advised)

Implementation of the Destination Experience Development Plan and delivery of the experiences will require each stakeholder agency or organisation to adapt the way they tell their destination story and will also shape the selection of future projects and initiatives which gain support in the next five years.

However, each new or enhanced visitor offering needs to do more than just 'tell a story'. It needs to provide visitors with an opportunity to experience the qualities of Killarney and to leave feeling fascinated and enriched by motivational experiences. It is the responsibility of each agency, product provider and business operator to embrace this approach and to put themed experiences at the top of the list of things shared with future visitors.

KDEDP WORKING GROUP IMPLEMENTATION GROUP

Fáilte Ireland will focus on working with industry that deliver the 'signature experience' and will help those businesses not currently doing so to start delivering and sharing their unique story. Fáilte Ireland will also support the international distribution efforts of tourism businesses.

KDEDP Working Group Implementation Group – will focus on guiding key projects and monitoring the DEDP progress.

Kerry County Council – will play a key role in industry and destination development through the implementation of the KDEDP.

Office of Public Works – will play a key role in the heritage experience delivery.

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Educators / Enterprise - as educators in tourism, the LEO, LEADER and Education and Training Boards can partner with Fáilte Ireland to assist tourism operators in creating and delivering experiences.

Local tourism groups - need to work together to share their experience stories with Fáilte Ireland and Tourism Ireland, and work with businesses to help them find and share their experience under the common themes established in the plan.

Individual businesses (Private Sector / Industry) - need to find which experience theme they best deliver, develop new or enhance existing experiences, and encourage their customers and the marketing agencies to share that story with the world.

IMPLEMENTATION OF FEASIBILITY PROJECTS

This plan identifies the need to examine the feasibility of a range of projects. Where proposals for new initiatives are progressed to feasibility stage, consultation with relevant interested parties will take place.

ALIGNMENT WITH EXISTING PLANS

This plan has been aligned with all agency plans (KCC, OPW, NPWS, TEIR ONE) In doing so, it both supports existing plans and seeks to gain leverage from their strategies and actions.

NOTE: Recommendations listed do not guarantee funding. All projects will have to go through the same application process. It is important to examine what agencies are offering funding. New streams of funding may become available during the life-time of this plan.

PRODUCTS AND EXPERIENCES REFERRED TO BY THIS PLAN

Products and Experiences both existing and potential referred to in this document are examples of such products only and are not intended to be an exclusive list. It is envisaged that others can and will be added during the lifetime of this plan.

5.2 MEASURING SUCCESS

The impact of the KDEDP will be measured through the monitoring of key metrics that examine the commercial development of tourism in Killarney. The plan framework adopts the VICE model as a means of measuring success. The VICE Framework identifies sustainable tourism as the interaction between Visitors, the Industry that serves them, the Community and culture that hosts them and their collective impact on and response to the Environment where it all takes place.

SPECIFIC RECORDED OUTPUTS FORM THE KDEDP ANNUALLY WILL INCLUDE:

- Increase in visitor numbers to attractions by 5% ahead of the national average from implementation
- Increased saleable product (5 new saleable experiences per DEDP) and improved distribution
- Increased visitor satisfaction - benchmarked through TripAdvisor
- Opening hour extension - 5% increase annually'

The indicative range of success measurements that will assess demand and supply conditions, destination level activity and adherence to responsible tourism principles are as follows.

DEMAND SIDE	
Measurement 1	Occupancy levels achieved
Measurement 2	REVPAR achieved
Measurement 3	Visitor numbers and visitor dispersion to key sites across Killarney assessed through measurement of footfall across key sites and attractions
Measurement 4	Visitor satisfaction of Killarney as a destination
Measurement 5	Visitor spend during visit assessing value over volume

SUPPLY SIDE	
Measurement 1	New tourism enterprise development
Measurement 2	Employment levels in tourism enterprises Grow the volume of destination experiences that are bookable online
Measurement 3	New experiences development based on saleable experiences
Measurement 4	Industry training - Volume of DEDP related courses and levels of participation on courses
Measurement 5	Enhancement of festivals - number of events and attendees at key events
Measurement 6	Extension of periods of business operations - season extension In Killarney

DESTINATION SIDE	
Measurement 1	Appropriate sustainable visitor management model identified and majority of actions implemented
Measurement 2	International recognition for sustainable destination through targeting sustainable tourism awards and relevant accreditation
Measurement 3	Increased reach of Killarney visitor experiences through social media channels

ENVIRONMENT	
Measurement 1	Develop effective management of the environment, including natural, cultural, and heritage assets through sustainable tourism.

5.3 ENVIRONMENTAL CONSIDERATIONS

This Plan provides an opportunity to ensure that all existing and future tourism projects and initiatives within the Killarney Destination & Experience Development Plan area are planned, developed and managed in a sustainable and integrated manner. The VICE (Visitor, Industry, Community and Environment) Model for Sustainable Tourism is an approach that this Plan is developed from and strives to implement.

Fáilte Ireland recognises the need to integrate environmental considerations into this Plan in a way that responds to the sensitivities and requirements of the wider natural environment. Environmental considerations including inland and coastal 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.

The protection, enhancement and promotion of our most important tourism asset – the natural environment has been an integral part of the formation of this Plan 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 Plan implementation stage, and
- Integrating requirements for environmental protection and management.

Environmental Assessment

Consideration has been given to the requirement to undertake environmental assessment of this Plan in order to ensure full legal compliance and to further integrate protection, enhancement and promotion of the environment in developing and implementing the Plan.

The following sets out the two types of environmental assessments that were considered.

1. Strategic Environmental Assessment (SEA)

The Plan was examined for the need to undertake Strategic Environmental Assessment (SEA). On initial examination of the Plan it was determined that full SEA would be required. The assessment process was completed having full regard to SEA Directive 2001/42/EU and to Statutory Instrument No. 435/2004 as amended. The outcome of this process can be

referenced in the relevant environmental documents that accompany this Plan.

2. Appropriate Assessment (AA)

The Plan was examined for the need to undertake Appropriate Assessment (AA). On initial examination of the Plan and in completing screening for AA, it was determined that Stage 2 AA would be required. The assessment process was undertaken having full regard to the Habitats Directive 92/43/EEC and to Statutory Instrument No. 477/2011. The output and outcome of this process can be referenced in the relevant environmental documents that accompany this Plan.

Key findings of the SEA and AA Process for the Plan

Having completed full SEA and AA on the Killarney Destination and Experience Development Plan it is evident that these processes have had a positive influence on the evolution of the Plan and will also continue to have a positive environmental influence as the plan enters its implementation phase. The outcome of completing the above environmental assessments has resulted in the following

- Identifying and mitigating where relevant potential environmental impacts resulting from the Plan.
- Identifying relevant positive environmental impacts arising from the Plan and ensuring the implementation of actions that result in environmental protection, enhancement and promotion e.g. visitor management actions, environmental and sustainable education.
- Developing a suite of mitigatory actions to ensure that any negative environmental impacts are reduced or eliminated at plan implementation stage this suite of mitigatory actions includes:
 - o The requirement to establish the status of the plan and its interrelationship with Statutory Decision making and consent-granting frameworks,
 - o Integrating the requirements for Environmental Compliance into the Plan. Particular emphasis is placed on the following:
 - Requirements for lower-tier environmental assessment,
 - The Kerry County Development Plan,
 - The Climate Action Plan 2019,
 - Visitor management,
 - Consideration for infrastructural capacity and green infrastructure,
 - Eco system services
- Development and execution of an **Environmental Monitoring Programme** for the Plan during implementation and operation.
 - o The SEA Directive requires that the significant environmental effects of the implementation of plans and programmes are monitored. Section A5a details the measures that have been selected in order to monitor the likely significant effects of implementing this Plan.
 - o Monitoring can demonstrate the positive effects facilitated by the Plan and can enable, at an early stage, the identification of unforeseen adverse effects and the undertaking of appropriate remedial action.
 - o 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 Plan and a possible review of part(s) of the Plan.
 - o Environmental monitoring will be based around indicators that allow quantitative measures of trends and progress over time relating to the Strategic Environmental Objectives.

- o 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 Plan itself. It will be reported on to the Plan’s implementation group on an annual basis where relevant information sources allow, and the findings of the monitoring will influence the actions of the plan as it progresses. The monitoring will be linked directly to the Plan KPI’s, including monitoring of visitor numbers where relevant.

Environmental monitoring for the Destination and Experience Development Plan and other existing/future Fáilte Ireland plans, programmes, etc. may be undertaken and reported on at the same time.

Appendix 1 sets out the indicators that will be used in the operation of this environmental monitoring programme.

Sustainable and Responsible Tourism

This Plan conforms and commits to sustainable growth of tourism in the Killarney area and, in completing the above-mentioned assessments, demonstrates the strong commitment to the VICE Model for Sustainable Tourism Development. The implementation of the guiding principles on the following page is key to the success of the Plan.

Guiding Principles for Sustainable and Responsible Tourism

<p>Assess the feasibility of developing and implementing visitor management plans where relevant.</p> <p>Encourage the adoption of a responsible tourism approach with ongoing monitoring of environmental impacts</p> <p>Increase awareness and appreciation of Killarney region’s unique landscape and environment.</p> <p>Increase environmental performance among tourism businesses.</p> <p>Encourage sustainable modes of transport and ensure they are accessible to tourists.</p> <p>Introduce and implement minimum sustainable standards for tour guides.</p> <p>Increase and promote environmental protection and enhancement when progressing actions derived from this plan.</p> <p>Ensure the EPA’s Environmental Sensitivity Mapping Webtool is consulted</p>	<p>Monitor the quality of visitor experiences and local social/cultural impact at key sites.</p> <p>Ensure visitor experiences are accessible to all where possible.</p> <p>Support voluntary and community led environmental protection projects, which in turn benefit tourism.</p> <p>Advocate for the protection of key environmental and tourism assets.</p> <p>Improve tourist management, particularly in mature and established tourist areas.</p> <p>Encourage tourism related businesses to engage in the Leave No Trace Programme.</p> <p>Ensure crucial infrastructure including water and wastewater services are in place and adequate.</p> <p>Harness the importance of ecosystem services and protected sites to</p>
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<p>when implementing projects resulting from this plan.</p>	<p>encourage sustainable levels of ecotourism growth and awareness.</p> <p>Ensure invasive species management is in place through the promotion of effective biosecurity measures</p>
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Implementation and Consent

This Plan is situated 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 DEDP will involve Fáilte Ireland helping to facilitate, promote, support and coordinate stakeholders (including local authorities, other government agencies, tourism 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 DEDP does not provide consent, establish a framework for granting consent or contribute towards a framework for granting consent.

In order to be realised, projects included in this Plan will have to comply, as relevant, with the various provisions of 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 this Plan is not part and does not contribute towards.

Further detail on requirements in this respect are set out in Section 9.2 of the accompanying SEA Environmental Report.

Integrating Requirements for Environmental Protection and Management into the Plan

The SEA and AA team worked with the Plan-preparation team at Fáilte Ireland in order to integrate requirements for environmental protection and management into the Plan.

Fáilte Ireland provides funding for sustainable tourism projects that emerge as part of specific, competitive, themed and time-bound grant schemes or as part of wider strategic partnerships. These include projects relating to land use, infrastructural development and land use activities and attractions. Reference made to such projects included in the Plan does not guarantee funding. While funding is provided to certain projects, Fáilte Ireland is not the developer.

In order to achieve funding (including promotion) for land use or infrastructural development or land use activities from Fáilte Ireland, Fáilte Ireland’s stakeholders shall be required to demonstrate compliance with measures relating to sustainable development, environmental protection and environmental management contained within the following Fáilte Ireland published documents:

- Wild Atlantic Way Operational Programme Appendix 5 “Site Maintenance Guidelines” and other relevant measures from the Fáilte Ireland visitor and habitat management guidelines series (and any subsequent replacements); and
- Wild Atlantic Way Operational Programme Appendix 6 “Environmental Management for Local Authorities and Others” (and any subsequent replacements).

In order to be realised, projects included in the DEDP (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 as appropriate) that form the statutory decision-making and consent-granting framework, of which the DEDP 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;
- Statutory land use plans that form part of the statutory decision making and consent-granting framework (e.g. Development Plans, such as the Mayo County Development Plan, and Local Area Plans) 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 2019 and the National Climate Change Adaptation Framework (2018 and any subsequent versions)

Infrastructure Capacity

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 shall be considered and mitigated as appropriate, where relevant. The promotion of developing visitor friendly infrastructure where it is required will also be encouraged.

Visitor Management

Those receiving funding 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. This will include the preparation of Visitor Management Plans, including for Catalyst Projects, where relevant.

Extensive research by Fáilte Ireland has shown improved environmental outcomes (including improved attainment of conservation objectives) in areas with visitor management strategies. Where available, this research will continue to be used as part of a feedback loop to inform ongoing review of Fáilte Ireland activities, including within the Killarney DEDP area.

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

Those receiving funding 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.

5.4 KDEDP ACTION PLAN

The implementation of the KDEDP is based on stakeholder commitment to project delivery. Key stakeholders will take ownership or partner on the delivery of the key tasks required to implement the KDEDP. It represents a five-year operational plan creating a commercial destination development focus for Killarney.

The KDEDP is designed to build on existing project plans and integrate all related activity for a co-ordinated series of outputs. This include projects that are being implemented, projects featured in existing plans and new concepts to build the destination’s capacity for new visitor experience development.

The implementation phase is structured around an action plan approach. The framework adopts the VICE model as a means of measuring success and is applied to the operational framework for the KDEDP. This includes the measurement of projects that will enhance tourism industry capacity development, experience creation and enhancement, catalyst and elevation destination enabling projects.

TIMING

Short-term	Year 1-2	2021 /2022
Medium-term	Years 3-4	2023/2024
Long-term	Years 5+	2025

Acronym	Stakeholder
KCC	Kerry County Council
OPW	Office of Public Works
DCHG	Department of Culture, Heritage and the Gaeltacht
FI	Fáilte Ireland
NPWS	National Parks & Wildlife Service
PS	Private Sector
KCB	Kerry Convention Bureau
KCTC	Killarney Chamber Tourism Council
IHF	Irish Hotel Federation
IVF	Irish Vintners Federation
LC	Local Community
LEO	Local Enterprise Office
HTI / HC	Historic Towns Initiative / Heritage Council
KETB	Kerry Education and Training Board
ITT	Institute of Technology Tralee

STRATEGIC PILLAR: DESTINATION COMPETITIVENESS		Time	Lead	Partners	FI Strategic Pillar
Project 1 - Business Tourism					
1.1	Deliver the new Kerry Convention Bureau Roadmap to Growth strategy to develop Business Tourism and address the challenge of seasonality in Killarney through enhancing its appeal to the MICE sector.	ST	KCB	FI KCTC KCC	Prepare the Pipeline
1.2	Examine the opportunity for a Gala Dining venue for Killarney that's enhances the business tourism capacity of the destination and increasing business tourism competitiveness versus other national MICE destinations.	LT	KCTC		Prepare the Pipeline
Project 2 - Festivals and Events					
1.3	Continue to support Killarney's current annual suite of festivals and events with a long term vision to develop an additional suite of festivals and events which will increase seasonality for Killarney through a multi-stakeholder approach, that will stimulate both the day time and evening economy.	MT-LT	KCTC PS	KCC FI NPWS	Delivering Excellence
Project 3 - Destination Performance					
1.4	Undertake a new accommodation performance and data research project to monitor tourism performance in Killarney with the support of the accommodation sector to confidently contribute data in a timely and regular manner to an agreed research system	ST	KCTC PS IHF	FI NPWS	Survive to Thrive

STRATEGIC PILLAR: DESTINATION BRAND		Time	Lead	Partners	FI Strategic Pillar
Project 1 - Destination Brand					
2.1	Review, refresh and develop the brand for Killarney creating a unified destination marketing approach supported by a narrative that defines the destination ambition for Killarney, delivered with the resources required to create an impactful international tourism destination brand.	ST	FI	All	Accelerate Domestic Tourism
Project 5 - Destination Imagery					
2.2	Develop the suite of visual assets that communicates the Killarney experience and reflects a new destination brand approach to be adopted by all stakeholders in marketing development.	ST	FI KCTC KCB	KCC	Accelerate Domestic Tourism

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STRATEGIC PILLAR: ALIGNING TOWN AND COMMUNITY		Time	Lead	Partners	FI Strategic Pillar
Project 6 - Re-imagining Urban Spaces (Strand A and Strand B Outdoor Dining)					
3.1	Work to sustainably develop the public realm through urban animation projects that have potential to transform and re-imagine urban centres for visitors. At the same time, create vibrant and creative communities and greater capacity in outdoor dining by supporting individual businesses to upgrade and enhance streets and public spaces and implementing weather-proofing solutions which will facilitate year-round outdoor dining.	ST-MT	KCC	KCTC FI	Opening the Outdoors
Project 7 - Public Realm, Placemaking & Orientation (Original 1)					
3.2	Develop new visitor experiences by enhancing the Killarney Town Story and creating a sense of place which will identify with the existing historical, cultural landmark buildings and promote the uniqueness of the town.	ST	KCC	FI KCTC IHF NPWS/OPW KCB	Opening the Outdoors
3.3	Implementation of new public realm plan for Killarney with strong pedestrian links to the town core which will include reimagining the laneways and improving connectiveness, promoting smarter sustainable transport modes by means of wayfinding and green linkages, orientating the town to the National Park and Killarney House & Gardens.	MT-LT	KCC	FI KCTC IHF NPWS/OPW KCB	Opening the Outdoors
Project 8 - Visitor Orientation					
3.4	Development of Killarney Experience Trails to introduce visitor to the full range of immersive experiences that exists such as the creation of thematic cultural, heritage and food trail options supporting visitor dispersion across the town.	ST	FI	PS KCC KCTC	Opening the Outdoors
3.5	Develop a consistent approach to visitor trails linking the town and park delivering an innovative waymarking approach that introduces visitors to new Killarney experiences and linking the town and the National Park with a menu of looped walks/cycles varying distances e.g. 1km, 5km, 10k and 25+ Killarney Trails encompassing and complimenting the development of the new corporate brand for Ireland's National Parks, which includes waymarking signposting.	MT	NPWS/ OPW	FI KCC KCTC	Opening the Outdoors
Project 9 - Killarney Retail Experience					
3.6	Review the retail offering for Killarney in light of insights and research which will address the diversification required from the local and visitors' perspective.	LT	KCTC PS	FI/KCC	Survive to Thrive
3.7	Examine the opportunity to create a market area and market experience for Killarney with a town centre focus to house artisan produce and add to the diversity of retail experiences.	MT-LT	KCTC PS KCC	FI	Survive to Thrive
Project 10 - Indoor Tourism Sites					
3.8	Examine the feasibility of a new indoor visitor attraction / activity centre for Killarney that will have	MT	PS KCTC		Prepare the Pipeline

STRATEGIC PILLAR: ALIGNING TOWN AND COMMUNITY		Time	Lead	Partners	FI Strategic Pillar
	the capacity to become a key attraction addressing the challenge of seasonality and generating all year-round activity and has the greatest potential to grow tourism.				

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STRATEGIC PILLAR: KILLARNEY EXPERIENCES		Time	Lead	Partners	FI Strategic Pillar
Project 11 – Killarney National Park					
(All projects will ensure that the biodiversity role of NPWS is fully understood and appreciated)					
4.1	Support the implementation of the Killarney National Park Tourism Interpretation Masterplan Framework (T.I.M.P.) to create new activity, heritage and cultural experiences for visitors and the local community through enhanced trails facilities and visitor servicing.	ST-LT	NPWS	FI KCC KCTC	Prepare the Pipeline
4.2	Examine the requirements to deliver the Lough Lein Loop.	LT	KCC	NPWS FI KCTC	Prepare the Pipeline
4.3	Assess the feasibility to complete a cycle and walkway from Killarney town to Muckcross as part of the Muckcross Lake Loop.	MT-LT	KCC	NPWS	Prepare the Pipeline
4.4	Assess the feasibility of maximising the opportunity for developing looped walks and trails linked to the national park that unlock the potential of the Killarney National Park as a major project for Killarney.	LT	NPWS	KCTC KCC FI	Prepare the Pipeline
4.5	Deliver an annual education programme for the tourism industry on the opportunities and constraints that exist within Killarney National Park for all Tourism Stakeholders to understand the daily operational programmes to deliver a responsible approach to use of the park.	ST	NPWS	KCTC FI	Prepare the Pipeline
4.6	Undertake an audit of existing visitor experiences and events currently operating in the Killarney National Park examining how many are prebookable to 'walk up' experiences or events. Pilot an annual or bi-annual permit system for activity providers operators in association with accommodation providers which will include terms, conditions and guidelines that will protect park resources and the role of NPWS while allowing the event or experience to enjoy the park without interfering with other park visitors, protect the park resources and role of NPWS.	ST	NPWS FI	KCTC KCB PS	Prepare the Pipeline
4.7	Assess the feasibility of developing a new natural sculpture trail linking the town with Killarney National Park.	ST	NPWS	KCC KCTC	
Project 12 – Killarney House					
(All projects will ensure that the biodiversity role of NPWS is fully understood and appreciated)					
4.8	Deliver on the potential of Killarney House and Gardens through a master planning approach from external signage to the use of additional on-site facilities as part of visitor experience	MT	NPWS	KCTC KCC FI	
4.9	Support and deliver on the potential of visitor experiences for Killarney House and Gardens.	MT	NPWS	KCTC KCB FI	
4.10	Assess the feasibility of developing a "shared facilities" unit for use by activity providers and consumers in the National Park.	LT	NPWS	KCTC PS	

STRATEGIC PILLAR: KILLARNEY EXPERIENCES		Time	Lead	Partners	FI Strategic Pillar
Project 13 – Killarney Arts and Cultural Experiences					
4.11	Expand the level of accessibility of the arts and cultural experience provision for visitors through the two new cultural venues, delivering day and evening time experiences.	MT-LT	KCC	FI KCTC PS	Prepare the Pipeline
Project 14 – Killarney Food and Drink Experiences					
4.12	Develop new food and drink experiences in Killarney and increase the variety of quality dining options available to visitors.	ST	FI KCTC		Prepare the Pipeline
4.13	Develop a motivational and innovative Killarney Food Trail for visitors linking the Killarney Food Story with associated food and drink experiences.	ST	FI KCTC	KCC LEO	Prepare the Pipeline
4.14	Examine the development of new Killarney food and drink experiences and venues to deliver uniquely Killarney evening experiences.	MT	FI	PS KCTC	Prepare the Pipeline
Project 15 – The Killarney Story					
4.15	Examine the potential to capitalise on Killarney's outdoor assets and re-imagine its story/stories through its urban spaces with the development through a public realm and urban animation project that have the potential to transform and re-imagine Killarney urban centre for both visitors and communities.	ST	KCTC	KCC FI	Prepare the Pipeline
Project 16 – Digitalisation					
4.16	Digitalisation for businesses to expand their market reach, increase growth and improve operational efficiencies as well as enhancing the visitor experience and improving destination management. Websites, booking facilities and digital distribution technologies must be adopted by attractions and activity provider to target those in the planning phase of their trip and those that are already in-destination researching things to see and do.	ST-MT	FI	KCTC IHF KCC	Digital that Delivers

STRATEGIC PILLAR: EXPERIENCE ARTISANS		Time	Lead	Partners	FI Strategic Pillar
Project 17 – Business Capability					
5.1	Develop the Front of House local experience training programme to build industry capability of both day and night time experiences which they can share with visitors to Killarney, i.e.. what's on, where to go, how to book etc.	ST	FI	KECB ITT KCTC KCB NPSW	Survive to Thrive
5.2	Develop a new focus on itinerary creation for visitors to extend dwell time in Killarney. This will see the creation of packages that link tourism providers in Killarney with other tourism providers to co-create new added value experiences in Killarney and on the Wild Atlantic Way.	ST	FI	KCTC KCC IHF ITT NPWS	Survive to Thrive
5.3	Demonstrate destination leadership in the creation of strong content and engagement with digital platforms and technologies to communicate with visitor audiences showcasing new, collaborative experiences.	ST-LT	KCTC FI	PS KCC ITT KTIF	Digital that Delivers
5.4	Conduct an audit of experiences available in Killarney, review how they are being "sold" to the visitor and categorise in terms of Activity, Heritage, Day time experience, night time experience, bookable online	ST	FI	KECB ITT KCTC, KTIF KCB NPWS/OPW	Prepare the Pipeline
5.5	Increase the number of bookable experiences available to visitors in Killarney across the day and evening economy.	ST-LT	KCTC KTIF	FI KCC	Digital that Delivers
5.6	Deliver a bespoke modular business supports programme for Killarney through the creation of a visitor experience innovation academy programme. This programme will improve industry product knowledge, increase levels of collaboration and increase both domestic and international economy for Killarney.	ST-LT	FI	KCTC KCC NPWS/OPW IHF	Survive to Thrive
Project 18 – Safe Destination					
5.7	To ensure all businesses in Killarney adopt and promote the Safe Destination Kerry initiative and which links to the Purple Flag recognising excellence in the management of the evening and night-time economy and Killarney a safe and friendly environment in which to live, socialise and work.	ST-MT	KCC KCTC	KCTC KETB IHF LC	Delivering Excellence
Project 19 – Evening Economy					
5.8	Implement a new evening experience development focus to new evening time experiences in Killarney outside of public houses and maximise its events hosting capacity to stimulate the evening economy.	ST	IHF PS KCTC	FI KCC NPWS	Accelerate Domestic Tourism
5.9	Maximise the potential of Killarney as a leisure and business event centre to host large events and become a catalyst for engaging with the evening economy.	ST	IHF PS KCTC KCB	FI KCC	Prepare the Pipeline
5.10	Support the continued development of the Purple Flag and its capacity to create a unifying	ST-LT	KCTC KCC	PS FI	Delivering Excellence

STRATEGIC PILLAR: EXPERIENCE ARTISANS		Time	Lead	Partners	FI Strategic Pillar
	engagement platform for the community and the tourism industry				
Project 20 - Sustainable Tourism Destination					
5.11	Develop an industry and community wide approach to sustainable tourism that supports Killarney's ambition to be a world leading responsible tourism destination	ST-LT	FI KCC	KTIF KCTC PS LC	Reducing the Carbon Footprint
Project 21 - Tourism for All					
5.12	Develop the opportunity for accessible tourism in delivering 'Tourism for All' with Killarney as the leading national accessible tourism destination in Ireland.	ST-LT	KCC KCTC	FI	Stay Safe
Project 22 - Active Travel					
5.13	Develop high quality walking and cycling facilities in Killarney as part of the Active Travel funding which will encourage more people to switch to active travel and will contribute to tackling climate change. Connecting communities and making walking and cycling attractive, safe and accessible to everyone is what this funding will help to accomplish	ST-MT	KCC	KCTC LC	Reducing Carbon Footprint



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APPENDIX 1
Selected Environmental Indicators,
Targets and Monitoring Sources

Selected Environmental Indicators, Targets and Monitoring Sources

Environmental Component	Indicators	Targets	Source and (where available) Frequency
Biodiversity, Flora and Fauna	B1: Conservation status of habitats and species as assessed under Article 17 of the Habitats Directive	B1: Maintenance of favourable conservation status for all habitats and species protected under National and International legislation to be unaffected by implementation of the Plan	<ul style="list-style-type: none"> • Documentation demonstrating compliance with "Requirements for Environmental Protection and Management" • Lower tier environmental assessment and decision making by local authorities • SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies) • Department of Arts, Heritage, Regional, Rural and Gaeltacht Affairs' report of the implementation of the measures contained in the Habitats Directive - as required by Article 17 of the Directive (every 6 years) • Department of Arts, Heritage, Regional, Rural and Gaeltacht Affairs' National Monitoring Report for the Birds Directive under Article 12 (every 3 years) • Consultations with the NPWS • CORINE mapping resurvey (every c. 5 years) • Input from any other existing or replacement Fáilte Ireland monitoring programmes
B2: Percentage loss of functional connectivity without remediation resulting from Plan	B2: No significant ecological networks or parts thereof which provide functional connectivity to be lost without remediation resulting from the Plan		
B3i: Number of significant impacts on relevant habitats, species, environmental features or other sustaining resources in designated sites including Wildlife Sites resulting from the Plan B3ii: Number of significant impacts on the protection of listed species	B3i: Avoid significant impacts on relevant habitats, species, environmental features or other sustaining resources in designated sites including Wildlife Sites resulting from the Plan B3ii: No significant impacts on the protection of listed species resulting from the Plan		
Population and Human Health	PHH1: Occurrence (any) of a spatially concentrated deterioration in human health arising from environmental factors resulting from the Plan, as identified by the Health Service Executive and	PHH1: No spatial concentrations of health problems arising from environmental factors as a result the Plan	<ul style="list-style-type: none"> • Documentation demonstrating compliance with "Requirements for Environmental Protection and Management" • Lower tier environmental assessment and decision making by local authorities • SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies) • Consultations with the HSE and EPA

	Environmental Protection Agency		<ul style="list-style-type: none"> • Input from any other existing or replacement Fáilte Ireland monitoring programmes
Soil	S1: Artificial surfaces land cover extent	S1: Contribute towards the target of the National Planning Framework's SEA (2018) to "Maintain built surface cover nationally to below the EU average of 4%."	<ul style="list-style-type: none"> • Documentation demonstrating compliance with "Requirements for Environmental Protection and Management" • Lower tier environmental assessment and decision making by local authorities • SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies) • CORINE mapping resurvey (every c. 5 years) • Input from any other existing or replacement Fáilte Ireland monitoring programmes
Water	<p>W1i: Classification of Overall Status (comprised of ecological and chemical status) under the European Communities Environmental Objectives (Surface Waters) Regulations 2009 (SI No. 272 of 2009)</p> <p>W1ii: Mandatory and Guide values as set by the EU Bathing Water Directive and transposing Bathing Water Quality Regulations (SI No. 79 of 2008)</p>	<p>W1i: No deterioration in the status of any surface water or adverse effect upon the ability of any surface water to achieve 'good status' as a result of the Plan</p> <p>W1ii: No deterioration in the value of bathing waters or adverse effect upon the ability of any bathing water to achieve Mandatory values and, where possible, Guide values as a result of the Plan</p>	<ul style="list-style-type: none"> • Documentation demonstrating compliance with "Requirements for Environmental Protection and Management" • Lower tier environmental assessment and decision making by local authorities • Data issued under the Water Framework Directive Monitoring Programme for Ireland (multi-annual) • EPA The Quality of Bathing Water in Ireland reports • SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies) • Input from any other existing or replacement Fáilte Ireland monitoring programmes
W2: Interactions with Groundwater Quality Standards and Threshold Values under Directive 2006/118/EC resulting from development adhering to the Plan	W2: Not to affect the ability of groundwaters to comply with Groundwater Quality Standards and Threshold Values under Directive 2006/118/EC, subject to exemptions provided for by Article 4 of the WFD		
W3: Compliance of relevant lower tier assessments and decision making with the Flood Risk Management Guidelines	W3: For lower tier assessments and decision making to comply with the Flood Risk Management Guidelines		
Air and Climatic Factors	AC1: Demonstration of compliance with provisions relating to climate adaptation and mitigation have been integrated into the Plan.	C1: To maximise the amount of measures relating to climate adaptation and mitigation being implemented	<ul style="list-style-type: none"> • Documentation demonstrating compliance with "Requirements for Environmental Protection and Management" • Lower tier environmental assessment and decision making by local authorities • SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on

			<p>various timescales and frequencies)</p> <ul style="list-style-type: none"> • Input from any other existing or replacement Fáilte Ireland monitoring programmes
Material Assets	<p>M1: Number of instances whereby additional tourists are directed by beneficiaries of funding towards areas in the Plan area where adequate and appropriate critical infrastructure with sufficient capacity is unavailable</p>	<p>M1: No instances whereby additional tourists are directed by beneficiaries of funding towards areas in the Plan area where adequate and appropriate critical infrastructure with sufficient capacity that does not present a danger to human health are unavailable</p>	<ul style="list-style-type: none"> • Documentation demonstrating compliance with “Requirements for Environmental Protection and Management” • Lower tier environmental assessment and decision making by local authorities • SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies) • Consultations with the partners such as the EPA, Irish Water and/or Mayo County Council • Input from any other existing or replacement Fáilte Ireland monitoring programmes
M2: Number of significant adverse effects on the use of or access to public assets and infrastructure	<p>M2: No significant adverse effects on the use of or access to public assets and infrastructure</p>		
M3: Preparation and implementation of construction and environmental management plans	<p>M3: For construction and environmental management plans to be prepared and implemented for relevant projects</p>		
Cultural Heritage	<p>CH1: Percentage of entries to the Record of Monuments and Places protected from significant adverse effects arising from the Plan</p>	<p>CH1: No unauthorised adverse effects on archaeological heritage resulting from implementation of the Plan</p>	<ul style="list-style-type: none"> • Documentation demonstrating compliance with “Requirements for Environmental Protection and Management” • Lower tier environmental assessment and decision making by local authorities • SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies) • Input from any other existing or replacement Fáilte Ireland monitoring programmes
CH2: Percentage of entries to the Records of Protected Structures and Architectural Conservation Areas and their context protected from significant adverse effects arising from the Plan	<p>CH2: No unauthorised adverse effects on architectural heritage resulting from implementation of the Plan</p>	<ul style="list-style-type: none"> • Documentation demonstrating compliance with “Requirements for Environmental Protection and Management” • Lower tier environmental assessment and decision making by local authorities • SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies) • Input from any other existing or replacement 	

		Fáilte Ireland monitoring programmes	
Landscape	L1: Number of unmitigated conflicts with the appropriate protection of statutory designations relating to the landscape, including those included in Development Plans and other statutory land-use plans	L1: No unmitigated conflicts with the appropriate protection of statutory designations relating to the landscape, including those included in Development Plans and other statutory land-use plans	<ul style="list-style-type: none"> • Documentation demonstrating compliance with “Requirements for Environmental Protection and Management” - see Section 9 • Lower tier environmental assessment and decision making by local authorities • SEA Monitoring Programme reports for the land use plans of relevant local authorities (as required, monitoring reports published on various timescales and frequencies) • Input from any other existing or replacement Fáilte Ireland monitoring programmes

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APPENDIX 2
Kerry Convention Bureau
Roadmap for Growth 2019 - 2023



Kerry

A roadmap for growth

2019-2023



Fáilte Ireland



List of Abbreviations

BT	Business Tourism
CRM	Customer Relationship Management
CSR	Corporate Social Responsibility
DMC	Destination Management Company
FI	Fáilte Ireland
GDSI	Global Destination Sustainability Index
ICCA	International Congress and Convention Association
KCB	Kerry Convention Bureau
MII	Meet In Ireland
MICE	Meetings Incentives Conferences Exhibitions
SITE	Society of Incentive Travel Excellence
USP	Unique Selling Points
VDEP	Visitor Development Experience Plans

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Executive Summary

This document presents a strategic roadmap of proposed sales and marketing actions to be undertaken by Kerry Convention Bureau, with support from Fáilte Ireland's business tourism unit Meet In Ireland to grow business tourism in Kerry by a target of 12% per annum from 2019-2023, taking us from approx. €4.5m in 2019 to €7.1m in 2023.

The roadmap defines the environment within which Kerry Convention Bureau currently operates and sets out its vision and mission for the destination for the next five years. It highlights the MICE attributes of Kerry's regions and its competitive positioning both within Ireland and on a global stage.

From a national perspective, business tourism has grown significantly within Ireland in recent years. It is up by 36% since 2013 with revenue of €740m in 2018 and supports 20,000 jobs. Globally, business travel and spend is on the rise and Kerry is in a strong position to capitalise on this by continued and increased investment

SWOT Analysis

INTERNAL

Strengths

- Significant funding, resources and support from FI
- Framework set by FI roadmap to grow BT in region
- Highest concentration of 4 & 5* properties in Ireland
- Ireland's 2nd largest events centre, with 500 bedrooms on site & >2,000 in walking distance
- Knowledgeable and passionate Convention Bureau team
- Large, region wide bureau membership base
- Industry relationships/collaboration with proven 'Can Do' attitude
- Legacy reputation for quality delivery of complex programs
- Reputation within industry & marketplace
- Ability to market destination as united offering
- Compact destinations with offsite venues in close proximity to accommodation

Weaknesses

- Awareness of Kerry as BT destination on international stage
- Lack of new inventory & not reaching capacity in Conference facilities | Accommodation | Gala Dinner venues
- Limited capacity 'cultural/historical' offsite gala dinner venues
- Challenge re access; distance & perception
- Poor quality experience for group train travel
- Perception in marketplace that Kerry experience has been done
- Limited budget and resources to meet the needs of this demanding sector
- Lack of industry development to enhance and elevate BT product offerings
- Regional membership but Killarney most well known
- Ability to separate our distinct and diverse regions in the marketplace
- Access to additional funding outside of FI

POSITIVES

Opportunities

- Leveraging FI strategy & funding to grow BT in region
- Brexit: UK Common Travel Policy | Only English-speaking destination in EU
- Leverage from Killarney, WAW Gateway project activities
- Positioning as leading destination for CSR, sustainable 'green events', Wellness & Accessible Tourism
- Business development growth from additional KCB resource
- Collaboration with other Bureaux
- Development of dual destination itineraries
- Development of Industry strength sectors
- Growth of Ambassador Program
- Spread demand beyond Killarney to other MICE ready destinations
- Festivals & large-scale sporting events

Threats

- Impact of Brexit
- Flight access and cost
- Dominance of Dublin for International Access, 85% of all traffic
- Reduction in train frequency and capacity
- Road and transport infrastructure
- No new internationally branded hotels or developments
- Competitive bid funds offered by other Bureaux / countries
- Economic impact of rise in VAT rates marketplace
- Currency Fluctuation
- Business Travel Bans by corporations due to focus on sustainability
- Lack of investment outside of FI
- New Cork Events Centre
- Potential decline in bureau membership

EXTERNAL

Where are we now?

Within Ireland, Business Tourism has experienced a period of significant growth over the last five years, achieving revenue of almost €740m in 2018 and supporting 20,000 jobs.

In 2018, Fáilte Ireland set ambitious targets to grow this sector by a further 40% to €1bn+ by 2025.

To ensure these targets are achieved, Fáilte Ireland has created a very clear roadmap for growth. It identifies both potential challenges and critical success factors and sets out a series of recommendations which should be undertaken.

While many of the national activities undertaken by Fáilte Ireland have contributed to the growth of business tourism in regional Ireland over the last ten years, Kerry Convention Bureau in partnership with our membership & wider industry stakeholders, needs to identify the specific challenges it faces and set out our own roadmap to grow business tourism in the region.

Where are we now?

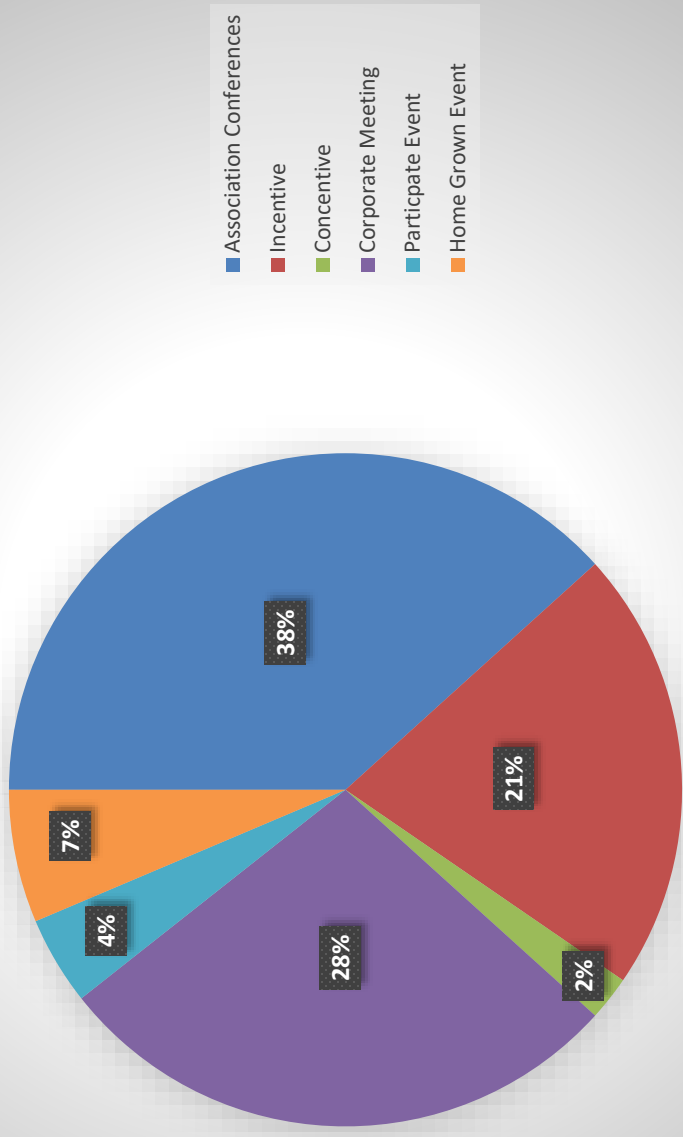
Kerry Convention Bureau is a not for profit organisation, in existence since 2008. We have established five diverse *MICE ready destinations within the region; Dingle, Kenmare, Killarney, Sneem and Tralee

- Kerry is recognised by buyers in the incentive sector as a key Irish destination for incentive travel experiences
- Irish DMC's all offer Kerry incentive itineraries, predominantly focused on Killarney with many running repeat client programs, year on year
- Kerry is often combined with either Dublin or Shannon for a dual itinerary
- Between 2000 – 2019, Killarney, in particular benefited from successive large corporate meetings groups, e.g. Google and IBM
- They were attracted by the combination of great infrastructure and a cohesive MICE infrastructure and community which delivered exceptional events
- Unique among the regions of Ireland, Kerry also boasts privately owned Killarney Convention Centre; a 2,500 pax capacity, purpose-built venue
- A key focus for the last three years has been ensuring that bureau represents the entire region of Kerry, not just Killarney

* MICE ready destinations defined as having KCB member hotels, offsite venues, activities options available

Where does the business come from?

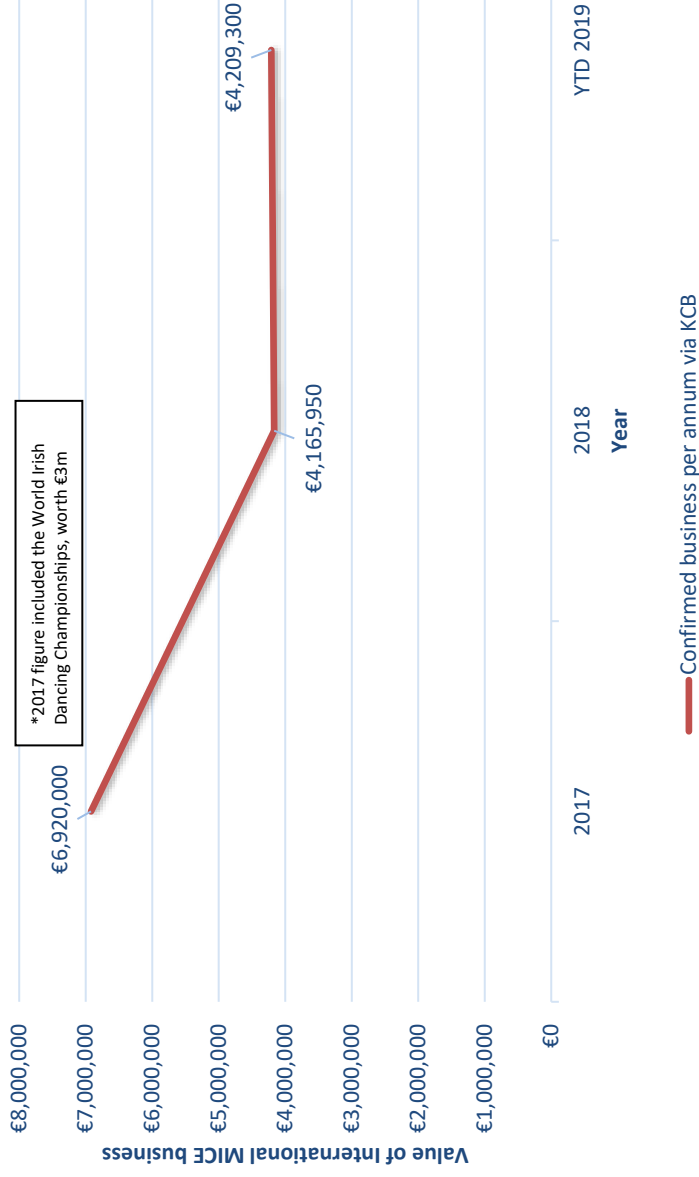
KCB MICE Business



The above breakdown is based on events confirmed for Kerry 2017 – YTD 2019, using the metrics devised by Meet In Ireland

How much is it worth?

Confirmed business per annum via KCB

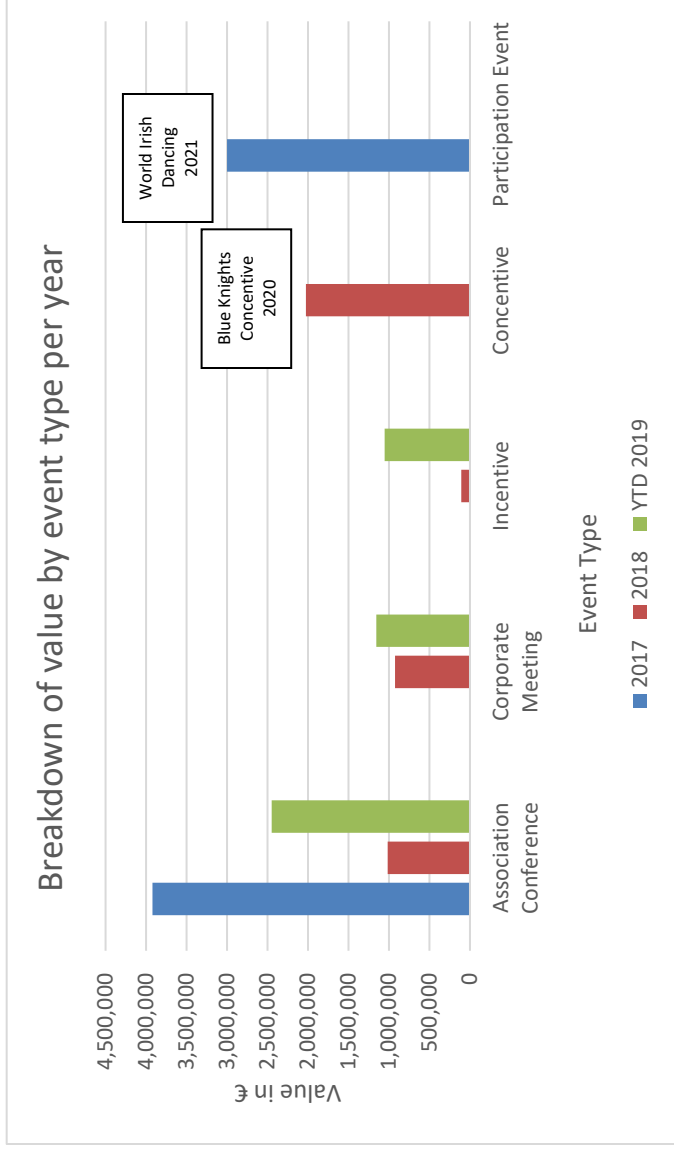


The above breakdown is based on events confirmed for Kerry 2017 – YTD 2019, using the metrics devised by Meet in Ireland

How much is it worth?

- Business confirmed for Kerry, via KCB using the Mill metrics grew by 6% in 2018 and is on target to achieve between 8-12% growth for 2019
 - ♦ For the purpose of this analysis, we removed the €3m recorded as won in 2017 for the 2021 World Irish Dancing Championships
- From a KCB perspective, in recent years, the most significant growth has been achieved in the Association Conference & Corporate Meeting sector as these opportunities have been developed via KCB or as handovers from Mill with the ability for us to engage with event planners, develop relationships & influence the decision
- While incentive business is big business for the region, particularly for the 5* properties, offsite venues and activity providers, this business in the main part is booked directly with suppliers by DMC's & US Incentive Houses
 - ♦ Some is captured in CRM if FI financial supports are sought or DMC has made KCB aware but it is very hard to put an accurate value on it or determine its true growth

How much is it worth?



Due to Association & Corporate Meetings offering the greatest opportunity for KCB and its members to target and influence business tourism growth for the region, the primary focus of resources & effort going forward will be on these two primary sectors, with incentive as secondary

How did we get here?

- Kerry Convention Bureau was started in 2008 on voluntary basis, manned by passionate local industry players
- The destination has had great success with large events such as Google, IBM, Adventure Summit & TBEX
- In 2016, Failte Ireland recognised KCB as Regional Convention Bureau & engaged new Manager with international convention bureau experience and expertise
- KCB business development & destination marketing activities have received significant support by Failte Ireland's business tourism unit Meet In Ireland with lead generation activities, marketing funding and ability to offer financial support program to potential clients
- Annual funding for KCB from Kerry County Council was also secured in 2016, with the organisations making commitment to support & leverage each other's destination marketing activities

How did we get here?

- Activities undertaken by KCB in the last three years to significantly increase awareness of the destination with the MICE marketplace & strengthen industry partnerships include:
 - ◆ Increasing membership by over 50%, becoming region wide from a hotel perspective and breadth of membership types widened
 - ◆ Roll out of Associate Membership category for DMC's & PCO's
 - ◆ Implementation of high-quality website
 - ◆ Social media campaigns and activity utilising #MeetInKerry #MakeltIreland brand messaging
- These activities have served to maintain and enhance Kerry's reputation for the quality and professionalism of our people and product

Key Success Factors

- Depth of legacy as tourism destination
- International reputation of Kerry industry professionals' 'can-do' attitude and exceptional hospitality
- Business Tourism/MICE is grafted onto industry partners existing understanding of tourism and how they generate revenues
- Extent of available infrastructure, particularly in 4 & 5* categories
- Ability to offer world class accommodation in spectacular locations
- Compact destinations with nature, history, heritage, culture and activities all in immediate proximity
- Ability to successfully market & deliver united destination offering i.e. town take-overs

Where do we want to be by 2023?

OUR VISION: For Kerry to be recognised as Irelands' premier business tourism destination for sustainability, community, social entrepreneurship and responsible tourism

OUR MISSION: To partner with our membership and industry partners to enable the attraction and delivery of business events that align with our Key Performance Indicators (KPIs)

OUR Key Performance Indicators

- KCB achieving year on year growth of 12% or above
- Business influenced and won by KCB to be made up of 70% Association Conferences and Corporate Meetings | 30 % Incentives
- Stable membership & growth achieved in all five MICE destinations

Where do we want to be by 2023?

Target KPI's for KCB:

- Winning total business for the region of *€7.1m per annum or above
 - ◆ Association Conference business > €4m
 - ◆ Corporate Meetings business > €800k
 - ◆ Incentive business > €1.7m

**The above figures are based on achieving 12% growth in each sector in 2020-2022, using business won between 2017-2019 as the baseline*

- Successfully selected as host destination in the 2020 tender process for the World Irish Dancing Championships between 2024-2029, based on planned successful delivery of 2021 event
- Holding minimum of two fairs and two trade events per year
- KCB website www.kerryconventionbureau.com receiving >7k visitors per year, with average dwell time of > 2.5 minutes

**The above figures are based on achieving 12% growth per annum from 2019 figures of 4.5k visitors, staying on the site for an average of 1.5 mins*

Where will this business come from?

Geographical Markets

- US and UK top two markets
- Develop pipeline from Germany, France and Canada
- Undertake desktop research to explore new markets Benelux, South Europe & Nordic | Emerging markets: China & India

Sectoral Markets

Association Meetings

- Attend trade events specific to this market such as new M&I Association Challenge, potentially partnering with relevant member properties
- Work with MII & Sarah Fleming research & use ICCA database to increase pipeline
- Expand Conference Ambassador program, developing stronger links with IT Tralee, Kerry Sci Tech & Prosper Kerry
- Plan local & national PR to raise awareness of Conference Ambassador Program
- Investigate bidding for relevant trade events such as M&I or C&IT to be held in destination

Where will this business come from?

Corporate Meetings

- Plan local and national PR activity to raise profile of Kerry as destination for corporate meetings
- Work with MII to leverage Corporate Champions Program
- Hold annual Dublin event
- Identify key influencers & decision makers in high potential, multinational organisations based in Kerry
- Plan sales activities to build initial relationships & gather information about potential meetings that would be a fit for the region

Incentives

- Work with DMC's to develop incentive product offering and support business conversion wherever possible
- Attend incentive specific trade events to grow KCB pipeline including C&IT, Break the Ice
- Encourage KCB members to increase commission paid to agents
- Investigate sponsorship opportunities which incorporate destination showcase
- Submit event case studies for Industry Awards

Growth Challenges

What is hindering our growth?

- Access
- Global political and economic situation
- Uncertainty around Brexit & its impact
- Capacity challenges including offsite historical/cultural Gala Dinner venue of size for incentive groups
- Range and freshness of product offerings
- Remaining a 'value for money' and competitive destination in high season
- Access to additional funding
- Seasonality; extension of shoulder periods
- Industry: Gaining buy in and ownership from industry partners such as OPW and NPWS to support development of activity options in national park
- Delays in developing Accessible Tourism offering

Critical Success Factors

- Development of Kerry USP's e.g. leading Irish destination for Accessible Tourism and/or Sustainability and/or CSR
- KCB and industry developing targeted Sales Focus – Go Get approach & implementing collaborative sales initiatives
- Implementation of effective sales activities targeting international Association Conference business
- Increase in pipeline of shoulder season business when Kerry can be most competitive
- KCB attending range of relevant, international trade events, outside of headline shows
- Revitalisation of relationships with DMC's
- Increased regional awareness with international audience
- Expansion of Kerry Conference Ambassador Program
- Progression of Accessible Tourism pilot project
- Development of creative and innovative CSR activities

Critical Success Factors

- Implementation and support of regional Sustainability initiatives, aligned with United Nations Sustainability Development Goals
- Annual improvement in Kerry ranking on GDS-Index
- Collaboration between FI and RCB's & further development of Convention Bureau of Ireland initiative
- Increased engagement with SITE
- Refresh of MICE product offerings & animation of small product offering
- Nurture and fostering of relationships with local activity partners/specialists to expand product range
- Alignment of Business Tourism Roadmap with Killarney Gateway project & regional Visitor Development Experience Plans (VDEP's)
- Raise profile of KCB locally, nationally and internationally to become event planners preferred route to market
 - ♦ Increase ability to add value, enhance programs and maximise KCB member opportunities
 - ♦ Establish KCB fund to provide additional supports to events which fall outside of FI financial support program

Recommended Steps to Success

1. Grow Destination Awareness

Develop KCB | #MeetInKerry brand and messaging & broaden its reach

- Create strong digital and content marketing strategy to drive business to www.kerryconventionbureau.com which is the region's BT shop window to the world
- Retain local marketing agency to manage marketing activities including Retargeting, Pay To Click advertising & some social media
- Undertake strategic sponsorships with organisations like C&IT, M&I at events & award ceremonies to raise international awareness of Kerry as a destination
- Roll out 'We are proud members of Kerry Convention Bureau' logo to be displayed on member websites, marketing collateral and e-sigs
- Ensure that #MeetInKerry & #MakelIreland is integrated into member & regional industry partners social posts where relevant
 - ♦ Track and engage to build awareness and strengthen brand
- Work with regional industry partners to develop BT messaging

1. Grow Destination Awareness

- Develop messaging based on brand pillars such as CSR, Sustainability and Wellness
- Use Hotel Group distribution channels to animate MICE activities with member hotels
- Deliver SITE Members Fam Program on next available year and participate fully in Dublin SITE Global Conferencing 2021 activities
- Develop suite of quality branded marketing collateral available to event planners to promote destination
- Establish Kerry Delegate Welcome Programs & Extend Your Stay Programs in each destination ensuring that delegates have the best possible experience whilst in region
 - ♦ Increase delegate spend and generate positive word of mouth and referral during and after their stay. This will ultimately help attract new events, gain repeat business and conferences and maximise delegate numbers

2. DMC/PCO Strategy

Provide DMC/PCO's new tools and supports

- Build a high-performance MICE destination which focuses on capability, service excellence and competitiveness
- Create opportunities for new, unique and authentic product to be put in front of Associate Member DMC's and PCO's
- Deliver three Annual #MeetInKerry Destination Dive Deep days
 - ◆ One event for Killarney, one for Kenmare/Sneem and one for Tralee/Dingle between Jan to Mar each year
 - ◆ Priority to attend given to Associate Members DMC's and PCO's
 - ◆ One-day, one-night events in destination
 - ◆ Include new experience, supplier networking session
 - ◆ Have other member destinations to attend and cross sell
 - ◆ Provide supporting content to enable creation of proposals which are fresh, exciting and unique

2. DMC/PCO Strategy

- Offer one-day, one-night new starter fams subject to availability to Associate Members
- Hold Annual DMC/PCO Showcase
 - ♦ One in region, which rotates destination | One in Dublin
 - ♦ Held same time each year & become 'Must Attend' events, with high profile speakers etc
 - ♦ Kerry Trade to partner and exhibit at both
- Run one DMC partner fam bringing US or European buyers per year, with partner DMC rotating each year
 - ♦ Three nights, multi destination in Kerry

3. Develop Knowledge Based Bidding

Position Kerry as a knowledge hub

- Move from a focus on infrastructure to highlighting our knowledge economy & use this to specifically target relevant Association & Corporate Meetings
- Reposition Kerry as a regional home to some of Ireland's best and brightest of minds
 - ♦ A centre for innovation, inspiration and a 'can-do' attitude
- Foster relationship and undertake specific business development activities with Kerry SciTech and their member companies
- Align messaging with key stakeholders such as IT Tralee
- Undertake Kerry Ambassador recruitment activities with organisations such as Prosper Kerry
- Hold sophisticated regional fam trips targeted to industry strengths, with local events and business sessions included

3. Develop Knowledge Based Bidding

Position Kerry as a knowledge hub



Members



Partners



4. Develop Product Offering

Reimagine and revitalise

- Create new experiences by enhancing and clustering existing product and suppliers by encouraging existing destination specialists to increase inventory of product
- Complete product matrix of signature experiences per destination, broken down into group size for easy reference
- Conduct full gap analysis of existing product
- Look at key experiences being booked for groups and reimagine e.g. Gap of Dunloe
- Local competition to develop new MICE products
- Strengthen messaging around Kerry being natures playground, Ireland's home to outdoor activities
- Work with FI & industry to develop high quality product offerings around pillars of Sustainability, CSR and Wellness
 - ♦ To aid development of wellness and mindfulness experiences, investigate build of covered platform overlooking water in National Park that can be booked by DMC's, hotels, convention centre etc

5. Share our Story

Develop Kerrys' Unique MICE Selling Points

- Define clear USP's which position Kerry as desirable destination and assist us to stand out when competing with other destinations
- Highlight distinctive and authentic VIP and unique products and attractions available set against stunning natural backdrops
- Promote winning combination of world class infrastructure along with breath-taking landscapes and compelling local culture
- Draw on work undertaken by FI in Visitor Development Experience Plans to develop our MICE destination stories
 - ♦ Use vignettes created under Memorable Meetings | Inspired Incentives | Captivating Conferences | Extraordinary Events
- Build messaging around Sustainability, Corporate Social Responsibility (CSR) and Wellness into our USP's
- Create suite of relevant event case studies & testimonials to profile on website and in marketing activities
- Look at creating content and stories based on destination features to differentiate regional mix

6. Target markets using best platforms

Prioritise markets and diversify based on best prospects

- Top three markets currently US, UK and Germany
- Increase activity to target French market, in line with direct flights into Cork & Shannon
- Organise one biennial in-market event e.g. in London, Germany or France in partnership with another RCB and/or Meet in Ireland, with Kerry trade also attending
- Maximise opportunities with US platforms such as Global Cynergies while membership in place
- Ensure CVENT listing is utilising all available destination marketing functionality, available within current package

7. Develop Kerry as Sustainable & Accessible destination

Become Ireland's premier BT destination for sustainability, community, social entrepreneurship & responsible tourism

- Link Kerry's reputation of lush green landscapes with delivering real 'green' sustainable experiences on the ground
- Endeavour to improve Global Destination Sustainability Index Ranking each year & remain in Top 20
- Encourage and increase industry participation in sustainability initiatives including:
 - ♦ Green Hospitality | Clean The World | StopFoodWaste.ie
- Ensure KCB goals are aligned to UN Sustainable Development Goals
- Work with FI and Kerry County Council to deliver Accessible Tourism initiatives
- Create positive messaging to be used as sales tool to specifically target 'Green Meetings' and communicate region as an accessible 'Destination for All'

8. Build Trade Capability

Provide KCB members new tools and supports

- Ensure industry are informed by sharing information to aid understanding of the BT market and encourage them to be active in developing BT product
- Encourage and support KCB members to undertake SITE Certified Incentive Specialist training
- Explore options for training to be offered to members and held in conjunction with KCB to create fresh, exciting and competitive proposals which present Kerry as a 'must do' destination
- Develop opportunities in alignment with FI to deliver product development workshops which drive enhancement and improvement of experiences utilised by both business tourism and leisure visitors

9. Build KCB Knowledge & Skillset

Increase key industry stakeholder engagement & professional development opportunities

- KCB Manager to complete SITE CITP: Certified Incentive Travel Professional training in 2020
- Increase involvement in SITE national and international activities
 - ♦ KCB Manager has been appointed role of Regional Ambassador
- Undertake professional development activities through attendance at industry conferences and workshops
- Explore projects to develop CVB Knowledge Exchange Programs with similar European MICE destinations



APPENDICES:

KCB Member Survey Results



Fáilte Ireland



MEET IN
IRELAND

Kerry Business Tourism Destination Marketing Roadmap Development Member Survey

In regards to the MICE business you secure, please indicate the following:

Respondent	% of Corporate Meetings	% of Association Meetings	% of Incentive	% of Exhibition	Average group size	Average length of stay	Usual airport they have travelled to Kerry via	Do you get repeat bookings clients? If yes, what type?
1	10	5	10	0	30-50	2	Shannon or Cork	No
2	2	0	5	0	30	2	Cork	No
3	5	50	5	5	250	2	Cork	Yes - Association
4	0	0	0	0	0	0	0	0
5	1.5%	0	0	0	30 pax	2-3 days	Kerry / Cork	Corporate Bookings
6	15	35	35	15	250	2 nights	Dublin	Yes, domestic retail
7	5	0	20	0	50-250	2-3	Shannon APT	incentive & corporate
8	10	10	70	0	150-200	3-5 nights	Shannon & Dublin	Yes
9	70%	5%	25%	0%	80	2	Dublin	Local corporates & DMC Clients
10	1%		2%		25			yes, corporate/incentive
11	1	1	25		15 - 350	1/2 day - 1 day	Dublin	
12	10	0	90	0	80	3	Shannon	Incentive

For incentive programs:

Respondent	What % would be dual destination? For those that have dual itineraries, which destinations are they usually coupled with?	What % incorporate a meeting component to the itinerary?
1	Dublin/Killarney	70
2	0	100
3	0	50
4	0	0
5	0	0
6	20%	90%
7	10% - Dublin	5% out of 20% incentives
8	50% - Dublin	80%
9	Unsure when it comes from DMC	10%
10	80% - Dublin/Cork/Killarney	0 to date
11	90%; Shannon / Dublin	80%

Where is your MICE business coming from % wise?



Respondent	Direct	KCB	DMC	PCO	Event Management Companies	Lead Generation Agency	Other: please detail
1	10	0	20	0	5	0	
2	90		5	2	3		
3	50	10	0	0	0		Internal direct targeting
4	95			2			
5	100%						
6	15	35	30	10	5	5	
7	75	3	5	5	2	10	
8			100				
9	80		20				
10	80%	0%	20%	0%	0%	0%	

Please indicate the following:

Respondent	What are the Top Three countries your MICE business is coming from?	Top three DIMC's bringing you business	Top three PCO's bringing you business	Top three Event Management Companies bringing you business
1	USA/Canada/Ireland, US, GB	Custom Ireland, Event partners, ATOI	Event Partners	as above
2	US, Ireland	0	0	0
3	Ireland mostly			
4	Germany / UK / USA	n/a	n/a	n/a
5	America, UK, ROI	Advantage ICO, Irish Horizons, Custom Ireland	Conference Connections, Event Partners	Go West
6	US, Ireland, Canada	Odyssey, Irish Horizons, Event Partners	N/A	N/A
7	USA / Canada /Germany			
8	USA, UK & Domestic	Odyssey, Irish Horizons, Event Partners		
9	USA; Ireland; Germany	Odyssey; Wallace Travel; M&K	N/A	N/A
10				

Do you ask for feedback on Requests for Proposals if not successful?

Respondents	If yes, what are the usual reasons given for why the business was lost?	What are the usual destinations we are losing out to?
1	Chosen a different Destination	Dont know
2	Location	Dublin, Castles or aborad
3	location	Dublin, Iceland, UK
4	Location	Killarney
5	Location too far from main cities	Dependant on origin of conference
6	Distance & flight access from nearest airport	European destinations - within Ireland destinations nearer to airport & more access such as Dublin
7	Yes always - varies from climate to value	Sunnier destinations
8	Chose differant destination	Norway, Baecelona, UK
9	Selected another country	Caribbean, Hawaii, Dublin, Edinburgh

When following up with event planners post event;



Respondents	What challenges if any do the event planners make you aware of in regards to doing business in Kerry?	What positives in terms of their Kerry experience and doing business in Kerry do they highlight?
1	Access, lack of gala dinner options	setting, outdoors, things to do, landscape
2	None	None
3	Access	Hospitality
4	Transportation	People and the welcome
5	Off site gala dinner venue for larger groups	Ease of doing business, Kerry & its stunning nature
6	Access	High standard of accommodation good touring base - the suppliers they use know the market and its requirements
7	Access to Airport location	Beautiful location, ample hotels, lots to chose from in terms of activity
8	Access, distance from major airport	"Can-do" attitude; fantastic range of activities

Please indicate the following:

Respondents	What do you feel our USP's and key destination attractions are?	Name up to three things you would like to see Kerry promote from a MICE destination marketing perspective
1	Landscape, activities, nature, food, people	the regions, food, new activities
2	Stunning Scenery, People, Food Quality, Meeting Facilities, Fabulous hotel, Logistic	Konnect in Kerry! :) All things business... Kerry is open to welcome business clients. Access
3	Variety of venues and unique cultural and activity options. Natural scenery	Culture, variety of activities, selection of properties
4	Quality of our hotels, Experience of Staff & Beautiful Scenery & Beaches	Corporate Market looking for areas off the beaten track / outside of the main tourist hubs that can provide something a little different. Itineraries with a difference unique offerings
5	Scenery, Activities, Town centre locations	
6	lots of outdoor activity possibilities for groups	more unique experiences tailored to MICE groups, more cultural experiences
7	The destination as a whole completes their requirements from transport provider accommodation providers tour providers and the amenities in the town	
8	No 2 destination on trip advisor on best places to stay, Scenery, Surrounded by renowned Golf courses	Kerry selling same activities for a number of years. We need to think outside the box and look at different activities to attract tourists & incentive companies.
9	Willingness to go the extra mile; natural beauty; warm & friendly people	Ease of access, from Dublin, via rail, road and/or air; Range & breadth of activities that are on offer; Quality & value of the accommodation

In terms of existing and new MICE product:



Respondents	What would be the top 3 standout products or experiences that you see being included in itineraries?	Are there any products or experiences being offered which you feel could be enhanced /refreshed? If yes, how?	Based on feedback from clients, are there any 'new' experiences which should be developed or are there existing ones, if enhanced or clustered (several small suppliers working together to increase capacity) which could fit the bill?
1	The Gap of Dunloe; The Ring of Kerry; Dingle Peninsula	The Gap, need to offer a better service on the pony & trap side. Stop trying to fit 4 pax in a trap, limit it to 2 (maybe 3).	
2	Gap of Dunloe		
3	Muckross House & Gardens, Killarney Lakes, Ring of Kerry, Molls Gap		Killarney is traditional...people take a step back and breath in its beauty while here. Clients love the destination when they get here!
4	Blasket Island Trip, Dingle Sea Safari, Dingle Cookery School	I think there is a strong focus on Killarney which should be spread a little better county wise. I appreciate Killarney ticks alot of boxes with size and offering but I think that there should be a greater county spread. Even break the county up into styles rather than specific areas - say The Wild Outdoors, Cultural and Quirky - just look a little differently at it.	
5	Outdoor adventure activities in North Kerry e.g. surfing, walking, coasteering.	Reaching out to local suppliers that would already be established for itineraries as listed above	n/a
6	Ring of Kerry, Dingle, Killarney National Park		
7	Gap of Dunloe, Muckross Farms, Ring of Kerry	Gap of Dunloe trip	food trail with local produce & different restaurants
8	The Europe hotel is the most commonly used hotel - the gap of Dunloe and Muckross house and gardens -		
9	Gap of Dunloe Trip, Irish Night, Killarney National Park		

Please indicate the following:

Respondents	Are there any international MICE trade shows that are outside of your budget which you feel would be worthwhile for KCB to consider attending?	If KCB was to hold in-market events, either solo or in conjunction with another regional bureau, would you consider attending?	If KCB held an annual Associate Members networking and product update event in Dublin, would you attend?	Do you have any feedback on the current style of KCB fam programs being delivered i.e. Dual destination Experiential Weekends? Is there anything you would change / add about this format?	Would you like to see KCB partner with a DMC to run fam programs e.g. US Buyers?	Would you be supportive of regular single agency DMC fams being offered by KCB to educate their new starters?
1	IMEX Las Vegas	Yes	Yes		Yes	Yes
2	Havent attended any shows in year, so am out of touch in this area	Yes	Yes		Yes	Yes
3	US Market	Yes	Yes	KCB put alot of working in organising these trips, and is concious of all its members when organising.	Yes	Yes
4		Yes	Yes		Yes	Yes
5	n/a	Yes	Yes	Basing itineraries in other areas of Kerry to experience perhaps a activity based week end. When other properties are joining on the evening it might be an idea to introduce the buyer or have them wear a name badge so they can be identified	Yes	Yes
6	Perhaps more European MICE trade shows as the focus for hotels is a lot on US already	Yes	Yes, we would consider to attend. Could this take place in Kerry and use opportunity to showcase Kerry	Perhaps we could look at showcasing an evening experience which can be also offered to future groups eg Celtic Steps	Yes	Yes
7	EIBTM Barcelona, AIPCO	Yes	Yes	No	If it enhances the event and increases conversions yes	Yes
8		Yes	Yes			Yes

Please indicate Yes or No for the following:

Respondents	If given the option, would you be open to including a 'We are proud members of Kerry Convention Bureau' logo on your website and MICE marketing collateral?	Would you be happy to include #MeetInKerry #MakeltIreland into your own social media messaging wherever relevant?
1	No	Yes
2	We would include it on a MICE page on our website when we redevelop it	Yes, for relevant posts
3	Yes	Yes
4	Yes	Yes
5	Yes	Yes
6	Yes	Yes
7	Yes	Yes
8	Yes	Yes
9	Yes	Yes

