Strategic Tourism Development Plan 2020-2025

Developing the
TOURISM POTENTIAL
of the **Munster Vales**

MUNSTER VALES

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MUNSTER VALES STRATEGIC DEVELOPMENT PLAN

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Executive Summary

This new five-year strategic tourism development plan is intended to guide development of Munster Vales as a destination and support the development of existing and new visitor experiences that align with the Munster Vales brand and encourage more visitors to stay in the area.

This strategy was commissioned prior to the impact of Covid-19 on the tourism economy of Ireland. Consultation was undertaken during the beginning of the crisis when impacts were less understood. Undoubtably Covid-19 will have a long lasting and transformational impact on the tourism industry of Ireland, from which the industry may take years to recover. This strategy has been written with consideration of such impacts, but importantly has sought to identify associated opportunities for businesses in Munster Vales, such as the potential for visitors to seek safe and outdoor destinations.

Covid-19 is having and will have a significant impact on tourism businesses within the Munster Vales. There are a range of supports available to businesses. These include:

Trading Online Voucher Scheme: Funding available in 2020 for the Scheme has increased from €2.3m to €5.6m (including €1m from DBEI). Detail available at:
https://www.localenterprise.ie/Tipperary/

Local Enterprise Offices (LEO) supports: These include the new COVID-19 Business Loan, LEO Mentor Programme; online training courses with detail available at:
https://www.localenterprise.ie/Tipperary/Training-Events/Online-Bookings/

MicroFinance Ireland (MFI): MFI provides unsecured start up, cashflow and business expansion loans to small business with the LEO screening and assisting applicants to prepare loan applications. This includes the Covid-19 Business Loan:
https://microfinanceireland.ie/loan-packages-2/covid19/

Restart Grant: businesses whose trading has been severely disrupted by the Covid-19 pandemic can now apply for funding from Government's €250m Restart Grant scheme.
https://dbei.gov.ie/en/What-We-Do/Supports-for-SMEs/COVID-19-supports/COVID-19-Restart-Grant-Local-Authority-Websites.html

Fáilte Ireland is supporting Ireland's tourism and hospitality industry, business owners and the wider tourism community through their COVID-19 Business Supports Hub. For the latest supports;
visit https://covid19.failteireland.ie

The context for this strategy is discussed in **Part Two**. This includes an **overview of progress** which highlights the following achievements since the launch of Munster Vales in 2017:

- Acted as an **umbrella destination brand** representing over 200 stakeholders providing each with a voice and gaining national and international awareness of the region;
- Gained over €5m worth of media coverage since 2017;
- Provided **training and mentoring to over 200 people** in the industry;
- Received funding for and supported **three large infrastructure projects and two feasibility and concept design projects** since 2016;
- **Focused on fostering economic development and entrepreneurship** leading to business opportunities, job creation, and a more sustainable local economy.

Key successes include:

- Excellence in collaborative digital marketing
- Strong team
- Ongoing local authority support and funding
- Cross selling and bundling curation
- Provision of training
- Enhancement of relationship between stakeholders
- Cross-county collaboration and strong collaborative relationships
- Attraction of international fam trips and 35 media trips
- Multiple awards

Delivery challenges include:

- Brand was perceived by some stakeholders as slow to get started
- Hard to buy tangible saleable experiences
- Obtaining and maintaining funding and support
- Gaining and maintaining support from Fáilte Ireland
- Lack of internal capacity
- Lack of buy-in from some industry members
- Lack of traction with travel agents and tour groups
- Concern that Munster Vales is competing with established and regional brands
- Difficult to sell the brand concept in some areas
- People find it hard to visualise the destination
- Needs clarity of purpose, clear messaging, and a focus for future delivery

To further raise the profile of Munster Vales, enhance the cohesiveness of the destination, and to maximise the opportunity presented by four local authorities working in partnership, this strategy was tasked with identifying a **small number of ambitious products that could be developed and led by Munster Vales** for example joined up product and experiences that encompass the Comeragh, Galtee, Knockmealdown, Nagle and Ballyhoura mountain ranges and are of significant scale.

Part Two also includes an **overview of relevant tourism data**, highlighting challenges in collecting such data for the specific Munster Vales area, as well as an **overview of key market segments**, and Munster Vales attractions performance. **Trends and threats** are identified which include:

- Significant post-recession growth albeit with significant Brexit and Covid-19 related recession hurdles to pass.
- Increased funding opportunities
- Development of and significant work undertaken as part of Fáilte Ireland's national brands programme.
- Changing tourism patterns

A wide variety of **in-depth consultation** was undertaken to inform this strategy including strategic conversations with accommodation and activity providers, interviews with key stakeholders, and an online survey. Details of those contacted are provided in Appendix 2. While face to face meetings and consultation workshops that had been planned were not able to go ahead due to Covid-19, **strategic conversations** were held with members of the Munster Vales Board, key members of local authorities and government agencies, and with key tourism industry and community stakeholders during April, May and June 2020, to elicit their views as to the perceived successes, challenges, and future strategic priorities for Munster Vales. Stakeholders views with regards to the priorities for, and role of, Munster Vales over the next three years are outlined below under **four themes** in **Part Three**.

Part Three also includes a summary of the **online survey** which received 69 responses between mid-March and early May 2020,

- Almost 1 in 10 respondents thought Munster Vales had directly contributed to an increase in the number of staff employed in their business since 2017.
- Over 30% of respondents (30.2%) thought that Munster Vales had contributed to an increase in visitor numbers to their business since 2017. When disregarding those that thought the question not applicable to them, the proportion rises to almost half or 47.5%.
- Respondents believe the most important activities for Munster Vale to be collaboration, product and experience development, and marketing and promotion.
- Suggestions for development of new products or experiences within the Munster Vales area, that would bring the mountain ranges together and be of significant scale as to attract a large volume of new visitors to the area, include:

  · Development of saleable experiences

  · Product and experience development with a focus on the mountains

  · Walking and cycling opportunities

Part Four reviews four relevant case studies of destination management organisations including:

\ Cumbria Tourism, UK
\ Mid-Wales Tourism, UK
\ Burren Ecotourism Network, Ireland
\ Rota Vicentina, Portugal

Some measures are identified in each that could be transferred to Munster Vales including:

- Membership fee
- Paid services
- My Cumbria card
- Networking model
- Strong research
- Joint buying power for members
- Annual conference and awards
- Measurement of overnights
- Online booking
- Destination map
- Volunteer network

Part Five seeks to establish an economic assessment of Munster Vales. Establishing the economic impact of Munster Vales as an entity currently would not be possible, as there are a wide range of businesses located within the boundary across the four local authority areas; and these businesses would not be able to distinguish the economic impact of activities undertaken by Munster Vales as destination management organisation, as distinct from for example their own marketing, word of mouth, promotion by Fáilte Ireland, county tourism bodies, or through media articles.

The only way in which direct economic benefit from Munster Vales activities, over and above other activities, could be measured were if accommodation, activities etc could be directly booked through the Munster Vales website, or through use of for example a Munster Vales card which gave visitors discounts, as used by other destination management organisations.

Based on a range of available data and assumptions in relation to the accommodation, attractions, and activities sectors, the following comments can be made with regards to the **economic value of tourism in the Munster Vales area:**

- Tourism is estimated to generate €266mn in revenue annually;
- This revenue can be expected to **support 7,182 jobs based on tourism;**
- Tourism within the Munster Vales area is worth **€61m to the Irish exchequer** annually;
- Indirect and induced benefits of visitor expenditure within the Munster Vales area is worth **€399m to the regional economy;**
- Combining the indicative direct visitor revenue and the indirect and induced benefits gives a figure of **€665mn as a value of total economic impact from tourism expenditure within the Munster Vales area**.

Part Six provides a summary of strategic issues in the form of a **SWOT analysis of Munster Vales** informed by destination analysis, strategic engagement, and online survey. Key issues to highlight are:

- The range of natural assets within the Munster Vales including five spectacular mountain ranges, Slievenamon Mountain, two large rivers, a stunning coastline and tranquil lowlands.
- The collaborative nature of Munster Vales with joint funding and development by four local authorities;
- The critical importance of securing ongoing funding to the future of Munster Vales.

Part Seven outlines an agreed vision statement for Munster Vales:

'The vision of Munster Vales is to promote, support and connect communities and rural tourism businesses offering a wealth of heritage, outdoor and visitor experiences across five mountain ranges in Cork, Limerick, Tipperary & Waterford.'

The aim of this strategic plan for Munster Vales is to increase visitor numbers and visitor revenue in the towns, villages, and tourism businesses within the destination, supporting a sustainable rural economy based on low-impact activity tourism, through harnessing collaborative investment and support.

The **strategic approach** is framed by three strategic priorities and eight high level goals as illustrated in the table 1. This section includes detail on **recommendations and actions** to deliver on the vision. The focus is on appropriate and achievable actions that will achieve the goals, and that focus on growing the Munster Vales brand, supporting the development of existing and new visitor experiences, and increasing revenue growth from overseas and domestic visitors.

Strategic Priority	Goal	Actions
Stakeholder and Community Engagement	1 To facilitate community and business engagement	**Covid-19 response** **Munster Vales Board** (composition review, focus groups) **Engagement** (community engagement pilot programme, enhanced network meetings, fam trips) **Capacity Building** (training needs assessment, online digital marketing course)
	2 To increase demonstrable socio-economic benefits from tourism	**Demonstrating Value** (visitor and business survey, information on value to members)
	3 To ensure adequate long-term resourcing of Munster Vales	**Resourcing** (membership model, staff resources)
Visitor Experience Development	4 To create compelling visitor experiences	**Munster Vales Experience Route** **Munster Vales Challenge** **Munster Vales Trails** (Munster Vales Food & Craft Trail, Munster Vales Garden Trail, Munster Vales Heritage Tour)
	5 To consider initiatives to unite the destination and to attract more visitors	**Walking Initiatives** ('Munster Vales Way', maps and app) **Cycling Initiatives** ('Munster Vales Greenway', maps and app) **Angling, equestrian and canoe/kayak Initiatives** **Munster Vales Green Corridor**
Visitor Awareness, Motivation and Engagement	6 To raise awareness of Munster Vales as an outdoor activity destination	**Marketing Delivery** (marketing programme, tagline)
	7 To make Munster Vales visible	**Destination Gateway Hubs** **Digital and Print Media** (maps and brochures)
	8 To promote online saleable experiences	**Online booking of tailored packages/ options**

Strategic Approach

"I've been fascinated to watch Munster Vales grow as a tourism brand in recent years. I think, as we embark on post-pandemic staycations, that open spaces, outdoors activities, fresh air and off-radar discoveries will be top-of-mind for home holidaymakers - and the region is clearly well-positioned here. Irish people are learning how important tourism is to the economy, many feel patriotic, and rural communities have an opportunity to tap into this now. The trick is distinguishing your area with a strong brand, message and selling point, avoiding confusion with other brands, and whetting our appetites for Irish explorations! As with all tourism endeavours in Ireland, it is critical for businesses in a particular area to work together in attracting visitors. Collaboration is key in helping messages cut through in our busy lives."

Pól Ó Conghaile,
Travel Editor, Irish Independent

PART ONE

Introduction

Munster Vales was established in 2017 as a destination to encourage and support growth and economic development in this rural and mountainous region, which encompasses parts of counties Tipperary, Waterford, Cork and Limerick, including the Comeragh, Knockmealdown, Galtee, Ballyhoura and Nagles mountain ranges and the communities between each of these ranges.

The development of Munster Vales so far has been underpinned by a detailed Concept Development and Feasibility Study. That study envisaged development and promotion of the Munster Vales as a single destination will:

- seek to conserve, enhance, and interpret the natural, built, and cultural environment of the area,
- provide a range of enhanced recreational opportunities and experiences for local people and visitors,
- provide a range of opportunities for a high quality and authentic experience for visitors to the area,
- generate local economic benefit, contributing to sustainable rural regeneration,
- raise the profile of the study area as a premier outdoor activity destination, and
- facilitate understanding, appreciation, and protection of the natural environment.

This new five-year strategic tourism development plan is intended to **guide development of the Munster Vales as a destination and support the development of existing and new visitor experiences** within communities that align with the Munster Vales brand and encourage more visitors to stay in the area.

Figure 1 Munster Vales Area

Scenic Day Drives
- Comeragh Drive - 115km (70 miles)
- Butler Trail - 95km (60 miles)
- Copper Coast Drive - 165km (100 miles)
- Suir Valley Drive - 130km (80 miles)
- Glen of Aherlow Loop - 95km (60 miles)
- The Vee Drive - 80km (50 miles)
- Ballyhoura Drive - 125km (75 miles)
- Sli Finn Drive - 30km (20 miles)
- Golden Vale Drive - 112km (70 miles)

Driving distances
Dublin to Cashel - 170km /1.75 hours
Rosslare to Dungarvan - 115km/1.5 hours
Cork to Fermoy - 40km/0.5 hours
Limerick to Lough Gur - 20km/0.25 hours
Mallow to Carrick-on-Suir - 100km/1.5 hours
Lough Gur to Dungarvan - 100km/1.5 hours

Map Symbols
- Ireland's Ancient East Discovery Point
- Place of Interest
- Scenic View Point
- Mountain Peak
- Beach
- Boat Trips
- N National Primary Road
- M Motorway

Waymarked Walks
St Declan's Way (100km)
Ballyhoura Way (90km) part of the Beara Breifne Way (500km)
Multeen Way (23km) part of the Beara Breifne Way (500km)
East Munster Way (75km) part of E8 European Route
Avondhu Way (95km) part of Blackwater Way and E8
South Leinster Way (105km) part of E8
Tipperary Heritage Way (56km)
Deise Greenway (25km) Dungarvan (open Aug 2016)
Butler Trail Greenway
E8 European Walk from Cork to Istanbul (5000km)
BearaBreifne Way from Cork to Cavan (500km)

PART TWO

Destination Context

Discussion around delivery challenges highlighted the following points:

· **Brand was perceived by some stakeholders as slow to get started** which caused some frustration
· **Hard to buy tangible saleable experiences** i.e. bookable experiences via website such as guided walks, horse-riding etc.
· **Obtaining and maintaining funding and support.** The four Local Authorities have an agreement in place until 2022 in funding the position of the Munster Vales Tourism Marketing Officer. *A need for longer term commitment was indicated. Ongoing and long-term funding commitment is critical and essential to the survival of Munster Vales as an initiative. Without long term commitment it is not possible to continue developing long term plans for Munster Vales.*
· **Gaining and maintaining support from Fáilte Ireland**, such as promotion of Munster Vales branded experiences, itineraries, and further engagement at meetings of the Munster Vales board.
· **Lack of internal capacity** with only one full time staff member with an extensive remit beyond marketing (e.g. engagement with businesses, training and development), and a lack of administrative support.
· **Lack of buy-in from some industry members** perhaps due to the size of the destination and the fact that Munster Vales is a relatively young concept compared to other destinations, with a need for more trade representatives on the Board of Munster Vales identified.
· **Lack of traction with travel agents and tour groups**, 'establishing a new destination is a slow process' large areas means some in the tourism industry within Munster Vales are not aware of what is in the region. Internal fam trips were suggested and this and other measures to raise the profile of Munster Vales as a destination are provided in the recommendations in **Part Seven**.
· **Concern that Munster Vales is competing with established and regional brands** e.g. IAE/WAW/Ballyhoura
· **Difficult to sell the brand concept in some areas** e.g. Limerick as the county has its own brand and marketing budget and is in the Wild Atlantic Way region. A range of measures to ensure Munster Vales supports and aligns with existing brands, and to demonstrate the value of Munster Vales are proposed.
· **People find it hard to visualise the destination** due to the size
· **Needs clarity of purpose, clear messaging, and a focus for future delivery**

In 2014 a strategy was produced to guide development of Munster Vales. This Concept Development and Feasibility Study for the Munster Vales focused on eleven separate areas with associated actions including KPI's. In recognition of limited resources, the delivery model primarily focussed on marketing and management measures, with product development remained local authority led. To further raise the profile of Munster Vales, enhance the cohesiveness of the destination, and to maximise the opportunity presented by four local authorities working in partnership, this strategy was tasked with identifying **a small number of ambitious products could be developed and led by Munster Vales for example joined up product and experiences that encompass the mountain ranges together and are of significant scale.**

2.1 PROGRESS REVIEW

Munster Vales has undertaken a range of initiatives since 2017 to drive the development and success of the destination. Research undertaken for this strategy has shown the Munster Vales project has:

· **Acted as an umbrella destination brand** representing over 200 stakeholders providing each with a voice and gaining national and international awareness,
· **Gained over €5m worth of media coverage** since 2017
· **Provided training and mentoring** to over 200 people in the industry,
· **Received funding for and supported three large infrastructure projects and two feasibility and concept design projects** since 2016,
· **Focused on fostering economic development and entrepreneurship** leading to business opportunities, job creation, and a more sustainable local economy.

Engagement with a range of key stakeholders, identified by the project steering group, listed in Appendix 1, highlighted the following key **delivery successes** over the last three years:

· **Successful digital marketing** which has built brand recognition, including high quality website with good layout.

· **Strong team** who have brought business and community together. Munster Vales Tourism Marketing Officer's role seen as critical to the overall success of the Munster Vales project; coordinating development, marketing and engagement.
· **Ongoing local authority support and funding** from the four county councils
· **Collaborative marketing** 'giving businesses a shopfront'; increased visibility in domestic and international markets.
· **Provision of training** to trade to enhance skill sets.
· **Enhancement of relationship between stakeholders** e.g. county councils and community representatives.
· **Cross-county collaboration and strong collaborative relationships** between board members.
· **Attraction of international fam trips** and 35 media trips from a range of online and print media e.g. Outsider Magazine, Irish Times Globetrotter TV New York Routard.com, The Indian Express.
· **Multiple awards** including Special Commendation from the Irish Planning Awards 2017/2018 organised by the Irish Planning Institute; Best Environmental Tourism Innovation in the Irish Tourism Industry Awards 2018; and Finalist as Best Tourism Initiative in the All-Ireland Community and Council Awards 2018.

2.2 TOURISM CONTEXT
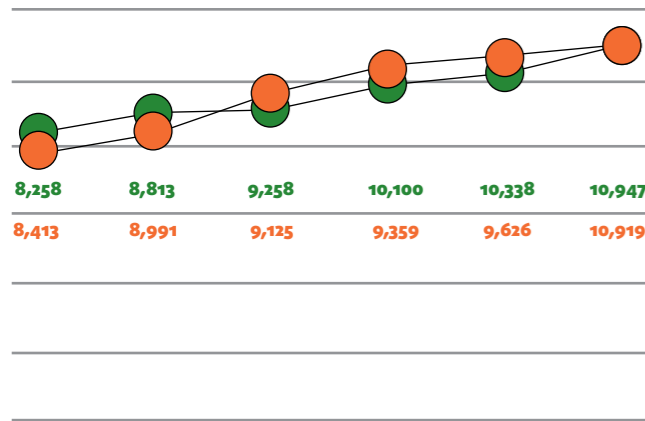
2.2.1 Tourism Data Overview

National Context

Tourism is a pervasive industry, linked to almost every aspect of the Irish and international economy. **Tourism has become increasingly important as an industry and socio-economic driver for Ireland**, backed by substantial investment in visitor attractions and facilities and by promotion by Tourism Ireland in international markets and Fáilte Ireland in the Republic of Ireland. In the last six years up to early 2020 Ireland became increasingly popular as a destination, with **significant growth in overseas and domestic visitor volume and revenue**, as shown in Figure 2.

Data from 2013-2018 indicate an increase during that period of over €2bn per annum in overseas visitor revenue (inclusive of revenue from visitors from Northern Ireland), to €5,612m from €3,620m, For the same period there was an increase of €473m in domestic revenue expenditure, to €2,006m from €1,533m.

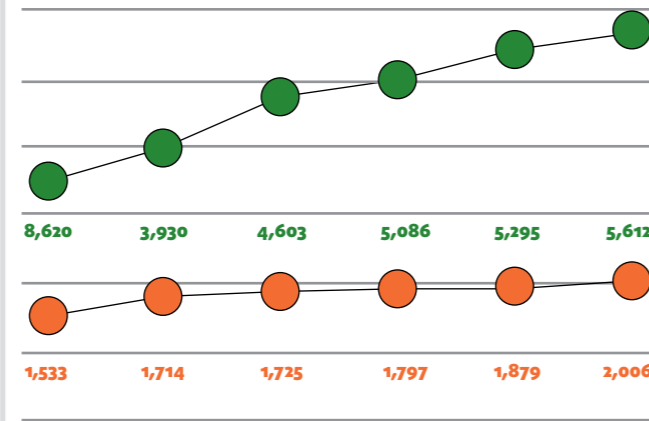*"Tourism has become increasingly important as an industry and socio-economic driver for Ireland."*

At a **national level, Mainland Europe** represented the largest direct contributor to Ireland in terms of tourism revenue in 2018, representing 35% (€1,846m) of the total direct revenue from overseas visitors. This was followed by the North American market at 33% (€1,747m), Britain at 20% (€1,025m), and Rest of the World at 12% (€600m), as illustrated in Figure 4.

In terms of volume Mainland Europe represented the largest market, representing 37% of the total overseas visitors (3,512,000). This was followed by visitors from Britain at 36% (3,480,000), North America at 20% (1,963,000) and the Rest of the World at 7% (654,000), as shown in Figure 5.

Until recently the government remained positive with growth envisaged to 2025. In this context the Government revised upwards its projections for visitor numbers and revenue, after targets published in the Tourism Action Plan in 2015 were reached seven years in advance. The new headline target is for:

- **Revenue** from overseas tourists, excluding carrier receipts, to increase to €6.5 billion in real terms (i.e. excluding the effects of inflation) by 2025, up from €5.2 billion in 2018.
- Secondary targets seek
- **Employment** in the tourism sector of 310,000 by 2025, compared to around 260,000 in 2018[1];
- 11.6 million **tourists** visiting Ireland annually by 2025 (tourists are defined as overseas visitors staying at least one night – the figure in 2018 was 9.5 million.

It is acknowledged that these targets were identified in a pre-Covid environment and may be revisited by the Government considering recent negative impacts on the tourism industry.

Volume ('ooo visitors)

Figure 2 Overseas and domestic visitor volume growth to Ireland 2013-2018 (Source Fáilte Ireland)

| 8,258 | 8,813 | 9,258 | 10,100 | 10,338 | 10,947 |
| 8,413 | 8,991 | 9,125 | 9,359 | 9,626 | 10,919 |

Revenue (€bn)

Figure 3 Visitor revenue growth 2013-2018 (€) (Source Fáilte Ireland)

| 8,620 | 3,930 | 4,603 | 5,086 | 5,295 | 5,612 |
| 1,533 | 1,714 | 1,725 | 1,797 | 1,879 | 2,006 |

By Revenue

Figure 4 Overseas Visitor to Ireland by Revenue 2018 (Source Fáilte Ireland)

1 - **Rest of world 12%**
2 - **Britain 20%**
3 - **Mainland Europe 35%**
4 - **North America 33%**
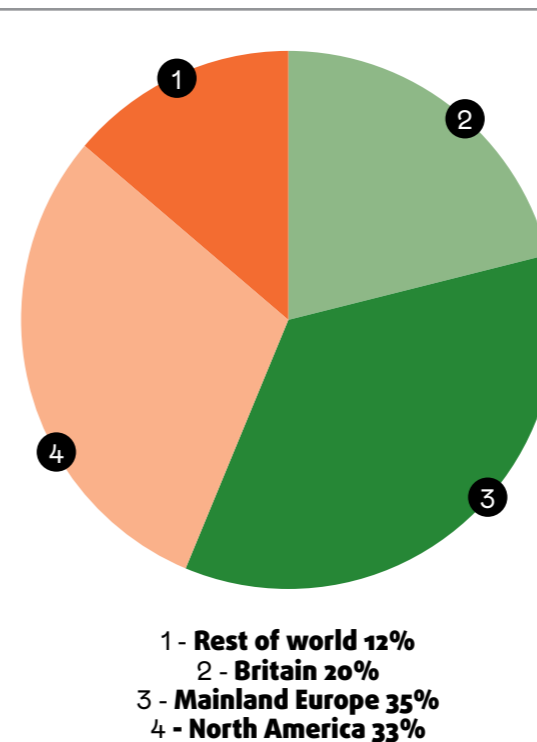
By Volume

Figure 5 Overseas Visitor to Ireland by Volume 2018 (Source Fáilte Ireland)

1 - **Rest of world 7%**
2 - **Britain 36%**
3 - **Mainland Europe 37%**
4 - **North America 20%**

[1] It is acknowledged that these targets were identified in a pre-Covid environment and may be revisited by government in light of recent negative impacts on the tourism industry.

Munster Vales Context

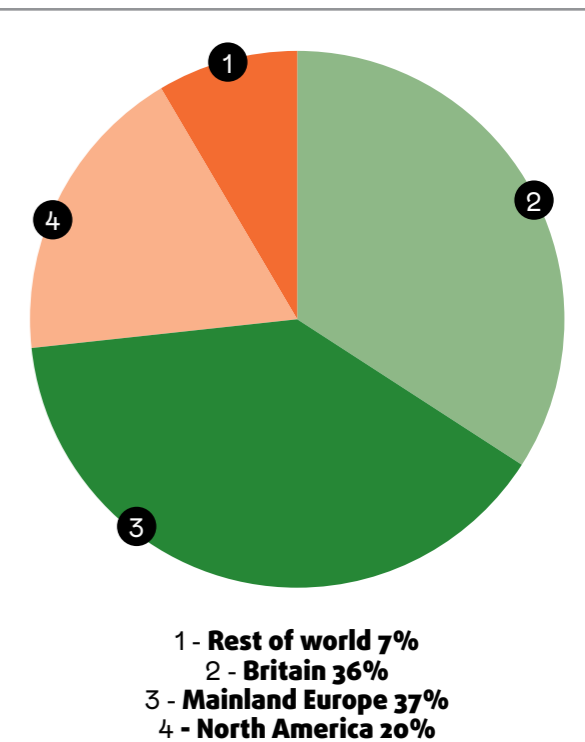Overall data can be identified for the four counties that make up Munster Vales; however, this data cannot be disaggregated for the defined Munster Vales geographic area. At best, this data can provide an indication of the scale of tourism as an industry in each of the four counties. Domestic data is not available for 2015. From 2018 on Fáilte Ireland is not providing data in the same format for each county, meaning comparative data is not available.

Demonstrating the value of tourism in Munster Vales is essential to enable year on year comparisons of growth, and to seek to identify the impact of Munster Vales initiatives. This is discussed further in **Part Five** which seeks to place a value on tourism in the destination, and as recommendations in **Part Seven** with regards to demonstrating value.

Part Two: Destination Context

Table 1 Overseas Visitor Volume to Munster Vales in 2015-2017 (Source Fáilte Ireland)

	2015	2016	2017
Waterford	263,000	273,000	255,000
Tipperary N&S	184,000	200,000	192,000
Cork	1449,000	1,377,000	1605
Limerick	537,000	568,000	647

Table 2 Overseas Visitor Revenue to Munster Vales Counties 2015-2017 (Source Fáilte Ireland)

	2015 (€000's)	2016 (€000's)	2017 (€000's)
Waterford	75,000	73,000	69,000
Tipperary N&S	66,000	76,000	65,000
Cork	558,000	579,000	631
Limerick	212,000	223,000	261

Table 3 Domestic Visitor Volume to Munster Vales in 2015-2017 (Source Fáilte Ireland)

	2015	2016	2017
Waterford	N/A	304,000	327
Tipperary N&S	N/A	202,000	248
Cork	N/A	944,000	1113
Limerick	N/A	188,000	284

Table 4 Domestic Visitor Revenue to Munster Vales Counties 2015-2017 (Source Fáilte Ireland)

	2015 (€000's)	2016 (€000's)	2017 (€000's)
Waterford	N/A	63,800	58,000
Tipperary N&S	N/A	29,600	46,000
Cork	N/A	180,300	202,000
Limerick	N/A	25,200	46,000

2.2.2 Overseas Key Market Segments

While visitors to Ireland come from around the world, there are **four main countries that play a key role in overseas tourism growth** with nearly 70% of all visitors and 60% of all overseas tourism revenue coming from Britain, USA, France and Germany. While Britain and Mainland Europe are **high volume** markets, the USA is a **high yield** market due to the high proportion of holidaymakers (rather than those visiting family friends or relatives or for business travel), their higher likelihood of staying in a hotel, and longer average stay. Around **a third of holidaymakers are repeat visitors** which highlights the opportunity to encourage a return visit by ensuring their expectations are exceeded and providing them with a compelling reason to return and recommend visits to others.

Ireland's secondary markets include Spain and Italy and the emerging markets include China, Gulf States (GCC) and India.

2.2.3 Domestic Key Market Segments

In 2018 over 59% of the population took a holiday trip in Ireland with over 55% taking a short break, defined as 1-3 nights away. 19% of the population took a long holiday – 4+ nights. Activities engaged on holidays include Places of Cultural Interest (39%), Hiking/Cross Country Walking (26%), National Parks (21%), Water Based Activities (20%), Festivals (17%), Gardens (17%), Spa Treatment Facilities (17%). Research showed a high level of satisfaction with holidaying in Ireland with 97% satisfied with their trip[2]. Over half of all domestic trips taken annually are holiday trips and Irish people take more domestic holiday trips each year than outbound holiday trips.

Fáilte Ireland through research have identified two key market segments for the domestic market, based on the variance of the characteristics and motivators to book a break or holiday. These are shown in Figure 6.

EMPTY NESTERS		PRE-TEEN FAMILIES	
More health conscious and spiritual	Interested in landscape, quiet and famliar locations	More adventurous	More prone to stress
Food and drink important	Quality relaxation breaks and to reward themselves	Slowing down, physical health, broadening their minds	More focus on daytime than evening/night time
Pay extra for quality	**Holidays = break in routine, opportunity to pursue hobbies**	Pay extra for quality	**Holidays = bonding, escaping hassles, recreating childhood experiences**

Figure 6 Key domestic target markets (Source Fáilte Ireland)

[2]Fáilte Ireland Domestic Tourism Monitor. Q1-Q4 2018

2.2.4 Munster Vales Attractions Performance

Table 5 below outlines the comparative performance of visitor attractions within the Munster Vales areas between 2016 and 2018 where these attractions provide data to Fáilte Ireland or to Munster Vales. While some data was not available as visitor attractions had not supplied or collected that data (with discussion regarding this issue included later in this strategy), it is clear those attractions with the higher visitor numbers are managed by the OPW.

Table 5 Comparative visitor numbers to key Munster Vales attractions (2016-2018)

Attraction	County	2016	2017	2018	Fee
Doneraile Wildlife Park (OPW)	Cork	480,000	480,000	480,000	No
Rock of Cashel (OPW)	Tipperary	338,830	376,488	374,092	Yes
Cahir Castle (OPW)	Tipperary	78,247	77,821	89,715	Yes
Donkey Sanctuary	Limerick	50,000	50,000	60,000	No
Lough Gur	Limerick	45,000	46,000	48,000	Yes
Lismore Heritage Centre	Waterford	23,000	25,000	31,888	Yes
Swiss Cottage (OPW)	Tipperary	24,933	23,330	25,281	Yes
Ballyhoura Mountain Bike Trails	Limerick	23,000	23,000	23,000	Yes
Brú Ború Cultural Centre	Tipperary	N/A	40,000	N/A	Yes
Dungarvan Castle (OPW)	Waterford	14,455	16,078	17,434	No
Cashel Heritage Centre	Tipperary	15,000	N/A	N/A	No
Tipperary Museum of Hidden History	Tipperary	12,480	9,575	12,270	No
The Main Guard (OPW)	Tipperary	9,845	7,591	8,529	No
Ormonde Castle (OPW)	Tipperary	Closed	8,436	6,558	Yes
Fethard Horse Country Experience	Tipperary	N/A	4,500	4,535	Yes
Nano Nagle Place	Cork	-	4,400	3617	Yes
Mitchelstown Cave	Tipperary	15,000	15,000	15,000	Yes
Carrick-on-Suir Heritage Centre	Tipperary	1,600	2,000	1,100	No

2.2.5 Trends and Threats

There are of course headwinds, and at the start of 2020 it was thought that Brexit and a potential recession in Germany would have the greatest impact on overseas and domestic tourism growth in the short to medium term. **The impacts of Covid-19 will be undoubtedly severe.** Fáilte Ireland CEO Paul Kelly recently stated: "Covid19 has been catastrophic for tourism. Economically tourism was hit first, hit hardest and will take the longest to recover".

It can be said with relative certainty that there will be little or no international tourism to Ireland in 2020; with international visitors returning in 2021. It can also be suggested that domestic tourism will rebound faster than overseas visitors, with pent up demand and one hopes strong demand for local and regional experiences in Ireland in the second half of 2020 and during 2021.

Accordingly, tourism strategies such as this will need to consider the impact this will have upon travel patterns and trends. Outdoor adventure in the context of stations, and rural short breaks are of increasing appeal to domestic visitors.
In the five years since Munster Vales began there have been significant changes in the Irish tourism industry that must inform any new plan. This includes:

- **Significant post-recession growth** in visitor revenue and volume with both metrics predicted to increase to 2025, **albeit with significant Brexit and Covid-19 related recession hurdles to pass.** Munster Vales can play a key role in driving growth to the area, and in the development of new visitor experiences.

- **Increased funding opportunities** ranging from the Urban and Rural Development Fund, Fáilte Ireland funding as well as LEADER, Town & Village Renewal, and the Outdoor Recreation Infrastructure Fund amongst others. Strategic projects are identified in Part Five that could be funded under these funding programmes.

- **Development of and significant work undertaken as part of Fáilte Ireland's national brands programme.** Ireland's Ancient East and the Wild Atlantic Way had not been completed when the first study was completed. While Munster Vales can now be considered an important sub-brand that enables inter-county collaboration as well as local engagement, it must align with these wider national brands and with relevant Visitor Experience Development Plans that relate to the Munster Vales product and destination.

- **Changing tourism patterns** with decreasing numbers of visitors from the UK, more from mainland Europe and visitors staying for a shorter duration.

PART THREE

CONSULTATION SUMMARY

3.1 KEY STAKEHOLDER SUMMARY

A wide variety of in-depth consultation was undertaken to inform this strategy including **strategic conversations** with accommodation and activity providers, interviews with key stakeholders, and an online survey. Details of those contacted are provided in Appendix 2. While face to face meetings and consultation workshops that had been planned were not able to go ahead due to Covid-19, strategic conversations were held with members of the Munster Vales Board, key members of local authorities and government agencies, and with key tourism industry and community stakeholders during April, May and June 2020 to elicit their views as to the perceived successes, challenges, and future strategic priorities for Munster Vales.

An overview of successes and challenges is provided earlier in section 2.1. Stakeholders views with regards to the priorities for, and role of, Munster Vales over the next three years are outlined below under **four themes.**

Four themes.

NO. 1

Management and Operation

NO. 2

Stakeholder and Community Engagement

NO. 3

Visitor Awareness, Motivation and Engagement

NO. 4

Visitor Experience Development

Management and Operation

Munster Vales Board: The board is thought to be working well, but some stakeholders thought the composition of the board needs review. **Increased industry and community representation was thought to be needed by some of those engaged in strategic conversations**, without increasing the board size. It was thought the board should have **separate focus groups** with distinct task areas e.g. a community, experience development, trails development.

Resourcing: While **the Munster Vales Tourism Marketing Officer role was considered critical**, most said one person in this role was not an adequate resource to carry out both marketing and developmental projects. Training is supported LEO's, some funding for marketing is provided from LEADER. This means there is **little opportunity for medium term marketing budget planning or experience development**. It was thought by stakeholders that there was a **strong case for more resources to support the Manager's role e. g. Marketing Officer, Development Officer, and Administrative Support**. While it was acknowledged funding is a challenge in achieving this funding would need to be separately sought to enable these positions to be created, and maximise the potential that Munster Vales offers.

Funding: Closely linked to the issued of resourcing; the issue of funding was highlighted by most stakeholders. *The Munster Vales Tourism Marketing Officer role was highlighted as critical and if Munster Vales is to continue as a destination then there must be commitment to ongoing funding from the local authorities*. Local authorities' perception of value was a concern, with some perhaps buying in to the concept of Munster Vales more than others. **Stakeholders felt that Munster Vales provided a collaborative benefit for local authorities** i.e. that together they can be more effective as part of Munster Vales in terms of promotion, networking, and funding. When discussing medium-long term funding some stakeholders thought that **Munster Vales would need to continue to be financially supported by local authorities**. Others thought that **Fáilte Ireland should support Munster Vales as an agency that drives regional and rural visitor dispersion**, in collaboration with local authorities. Some stakeholders raised the idea of **membership fees** to provide a more sustainable revenue stream. Others were of the view that requests for membership fees, in a post-Covid climate, would be unlikely to be popular. However,

membership fees might be feasible if the value and service offer of Munster Vales could be demonstrated to industry; they would be more likely to buy-in. It was suggested this could comprise a combination of experience bundle development/promotion, visible advocacy of rural tourism, networking, and perhaps an online booking system through the Munster Vales website. Currently there is no practical way for Munster Vales to demonstrate value to businesses across the destination, e.g. to provide tangible proof of benefit such as an uplift in visitors, bed-nights, dwell time. Enabling booking of, for example accommodation and experiences, through the Munster Vales website would provide measurable benefit of such promotion. However, it is noted that this is currently cost and resource prohibitive.

Further funding opportunities were highlighted such as the Rural Regeneration development Fund, and Outdoor Recreation Infrastructure Scheme (ORIS); as well as sponsorship and alternative means of raising funds such as a Munster Vales conference, and local fund-raising.

It is likely that the most effective funding approach, one supported by stakeholders, was a combination of a broad-based membership scheme, topped up by local authority support combined with the identification of suitable product development funding opportunities, and shared fundraising drives.

Stakeholder and Community Engagement

Communities: It was suggested by stakeholders that while Munster Vales began as a grass-roots project, **engagement with communities may not be as effective as in the past**, due to lack of resourcing and a focus on marketing and building trade relations. A more constructive community engagement and support programme is needed, **giving communities more attention to encourage engagement with the Munster Vales concept, and to identify local needs and opportunities**. It was suggested Munster Vales needs to **identify community needs across the region**, in terms of their understanding of the opportunity presented by Munster Vales, and **ensure communities have the required tools to leverage these opportunities**. For example, communities need to be mentored in how to leverage off the Munster Vales brand, and how to provide the welcome to visitors the brand represents, with a pilot programme suggested across the region in 2020 / 2021. In addition, communities need to have input into training needs assessment, perhaps through an annual needs request to identify capacity development opportunities.

Tourism is increasingly collaborative, between businesses, communities, counties and regions. Most in the tourism industry would see this as fundamentally important. It is **essential the message is communicated that Munster Vales is a collective of tourism providers, operators and communities**, with **local recommendations**, and an **understanding of the local product and experience offer**. It was suggested that there could be **more effective engagement with the Munster Vales network**, led by the Tourism Marketing Officer and supported by the board members, enabling network members to feed into Munster Vales work programmes. Network meetings could have more focus with those of similar representative bodies, such as AVEA, seen as more engaging and a good example to follow.

Trade support: It was highlighted by stakeholders that Munster Vales is currently working with LEO's on facilitating online training, as well as Business Continuity Vouchers tailored specifically to tourism providers. It was thought by stakeholders that there could be further communication to trade in terms of signposting to relevant supports; sharing virtual classroom training delivered by LEO's; providing details of LEO contacts. Communication with trade in the Munster Vales area should seek to ask if they are okay, do they need supports, do they need a sounding board for ideas, how can they do business differently? There was also suggestion that Munster Vales should advocate for enhanced rural broadband benefiting both visitors and businesses.

Training: It was suggested that there is a **clear role for Munster Vales to act as a conduit for businesses**, providing an opportunity to coordinate training with LEO and ETB who would not be entirely focussed on tourism. Munster Vales could ensure training meets the needs of businesses on the ground and are aligned with the brand through **training needs assessments**. There was suggestions Munster Vales could focus training audits on Waterford, Cork and Tipperary, while working alongside and collaborating with Ballyhoura in Limerick to avoid overlap.

Local authorities: With county councils expected to be under budgetary pressure in the post-Covid climate it was thought there is an increasing need for Munster Vales to add value to the work being undertaken by local authorities. Each local authority has their own tourism unit, county tourism strategy, and in turn is part of larger regional brands e.g. Limerick is within the Wild Atlantic Way, and Waterford, Cork, and Tipperary part of Ireland's Ancient East. Munster Vales was thought to bring added value in uniting local authorities behind a project, and in providing a personal one-to-one service linking providers on the ground, highly time consuming but invaluable.

Key agencies: Fáilte Ireland's have a responsibility to promote and develop key regional brands of Ireland's Ancient East and Wild Atlantic Way in the Munster Vales area and to develop initiatives and investment opportunities that bring these brands to life, aligned with associated themes. However, **Fáilte Ireland would be very keen to work with Munster Vales to help develop innovative visitor experience and bundles of experiences** that are linked to the themes of the regional brands. **The OPW** manage most of the most significant heritage attractions within the Munster Vales. As an organisation they are now strategically linked with Fáilte Ireland as a part of a significant funding programme. For this reason, the OPW must primarily support the regional brands before sub-regional brands e.g. at the level of Munster Vales or county brands. **Coillte** are supportive of Munster Vales and would view it as a success to date.

Visitor Awareness, Motivation and Engagement

Raising awareness: There was a strong consensus amongst stakeholders that Munster Vales has been particularly strong and effective in terms of digital media delivery, social media, and promotion, and that this work should continue. Some points raised included:

- **Priority must be to attract more visitors to the Munster Vales area and particularly more visitors to lesser known areas;**
- **Munster Vales should be more strategic in its marketing**, for example aligning with regional brands but with a strong rural experience theme;
- **Businesses within the Munster Vales area should be made more aware of Munster Vales marketing initiatives** and be more aligned with the brand. Focus must be on demonstrating value for smaller businesses;
- **Visitors are increasingly seeking tailored experiences and an individual approach**. This visitor-led approach, which is explored in some of the case studies in Part Four, can be achieved through targeted bundles of experiences, online booking of individual products and an integrated approach to selling. Can be difficult as this requires a change in mindset from some providers, but other destinations in Ireland and overseas are now doing this.
- Some said marketing should focus on **outdoor activity, beauty, and untouched scenery**, while others suggested the focus should be upon activities and heritage including people and living culture.
- In response to **Covid-19, marketing** should target the domestic market; promote Munster Vales as a destination with space/lack of crowds, clean air, a less-discovered place, and a place for reunions. Munster Vales should be part of Fáilte Ireland's #KeepDiscovering and #MakeaBreakForIt campaigns. There is a thought to be a significant opportunity here for Munster Vales, particularly in the promotion of outdoor activities such as walks and hiking options.

- **Marketing should particularly focus on the domestic market** in the short term; however, other destinations are preparing to aggressively promote themselves in overseas markets (recognising long lead times) once tourism starts to rebound and Munster Vales should be positioned for this with preparatory work undertaken. PR and fam trips are thought by some stakeholders to be crucial, while others question the benefit of this form of engagement and suggest data is needed to gauge whether positive impacts accrues to businesses involved.

Visitor Experience Development of new and existing tourism experiences

Connecting: Most of the stakeholders contacted, including members of the Munster Vales Board and representatives of Fáilte Ireland, said that one or more projects were needed that would consolidate and build the Munster Vales brand. Such a project or projects should reflect the Munster Vales brand and link the mountain ranges. This **iconic experience** should make the brand more visible, raise awareness of the area, attract visitors, and increase economic benefit from tourism.

Signage: Stakeholders indicated that there **should not be Munster Vales branded signage** as this would add to signage clutter, and perhaps confuse visitors due to other brands that exist in the area.

Focus on the mountains: Stakeholders indicated Munster Vales should be more focused on the mountains **e.g. walking/hiking**. This would give a more focussed approach to Munster Vales and attractions and activity owners able to use walking and hiking itineraries as a hook for their own attractions. The concept of a **Munster Vales Challenge** was suggested by some stakeholders, indicating that this should be led by the private sector.

Product development: Stakeholders made the point that Munster Vales should not be in the business of product development i.e. of attraction development. This would be the focus for the private sector and local authorities. However others said that **Munster Vales could play an important role in coordinating collaborative development between the four local authorities/development companies** in the development of, for example, an infrastructure project such as a walking or cycling route that linked the mountain ranges within the Munster Vales area. The long distance Beara Breifne Way was cited by a board member as a relevant example of current investment. The idea of a Munster Vales Way was suggested, based on the idea of a staged overnight route that links settlements.

Experience development: One of the most significant topics of conversation arising during consultation was the development of experiences with suggestions that Munster Vales should develop signature experiences e.g. ones associated with craft, food, heritage, activities. Fáilte Ireland suggested that **Munster Vales should identify 10-15 key businesses initially, identify**

experience gaps that are matched to target market **visitor requirements, and work with these businesses to bring high-quality experience to the market.** This would give Munster Vales more control over the experiences on offer, that are aligned to their themes. This has been developed further in the recommendations in Part Seven. In discussion with senior members of the Wild Atlantic Way and Ireland's Ancient East teams, **Munster Vales were urged to work with Fáilte Ireland to develop saleable experiences**, so that experiences were aligned to both the themes of Munster Vales, and of the regional brands. If experiences were aligned to the themes of Ireland's Ancient East and Wild Atlantic Way in the respective areas this would enable media trips, fam trips and marketing by Fáilte Ireland. Fáilte Ireland can also provide support in how to develop experiences including definition and route to market. Sales and Experience Workshops are the best avenue for this and would cover pricing, timing, tours, gaps (e.g. bread-making as a part of a farm tour). The **Tourism Marketing Plan & Visitor Experience Bundles for the Munster Vales** produced by Caroline Boland and ActiveMe in July 2016 was discussed. This was thought to have either not been implemented or not implemented in full, despite containing main strong experiences and experience bundle concepts. Stakeholders suggested this should be re-visited, experiences/bundles revisited to see what worked and what did not work, updated, and implemented. The goal should a **professionalisation and differentiation of the offer**, with a clear route to market.

Experience route: It was suggested by those contacted in strategic conversations that an experience route could be an innovative way to link the Munster Vales area together. This trail could be **a combination of a scenic rural route, with a variety of signature experiences off the route, that links settlements and could be completed in stages**. It was suggested that Munster Vales branded signage could be used to delineate the route, and in so doing work to unite the destination and make the brand more visible. This experience route could provide the hook into the destination for domestic and international visitors. It was suggested that visitors should be able to tailor their own personalised Munster Vales experience package, from the Munster Vales website. There should not be too may options as this might confuse people.

3.2 MUNSTER VALES SURVEY

In addition to stakeholder conversations, **an online survey received 69 responses between mid-March and early May 2020**. The main focus of the consultation was to review progress to date and to identify actions to develop Munster Vales as a brand that delivers value to tourism providers across the region, and creates awareness of the destination nationally and internationally while also investigating and identifying potential for experience and product development. Some **key points identified in analysis of survey responses** include:

■ Almost 1 in 10 respondents thought Munster Vales had directly contributed to an increase in the number of staff employed in their business since 2017.

■ Over 30% of respondents (30.2%) thought that Munster Vales had contributed to an increase in visitor numbers to their business since 2017. When disregarding those that thought the question not applicable to them, the proportion rises to almost half or 47.5%.

■ The domestic audience is important to Munster Vales businesses.

■ Accommodation providers provide a route to encourage increased numbers of international visitors to tourism providers such as outdoor activities, heritage, food and drink experiences.

■ Respondents believe the most important activities for Munster Vale to be collaboration, product and experience development, and marketing and promotion.

■ Training courses provided by Munster Vales that have been of most value include social media training, marketing, networking, tour guiding.

■ Future training courses that would be of value include marketing and social media/websites.

■ Suggestions for development of new products or experiences within the Munster Vales area that would bring the mountain ranges together and be of significant scale as to attract a large volume of new visitors to the area include:

· **Development of saleable experiences**, with comments including:
  · *Focus on **high-value small group experiences***
  · *Food & drink tourism, more luxury camping/glamping/self-catering facilities, "home hosting" experiences for Intl visitors, greater marketing of small businesses like small shops, cafes, etc. **Creation of "saleable experiences" for these types of small businesses.***
  · *Organise full day activity followed by evening entertainment so that they will stay several nights in the area and stop the idea of " doing Ireland in a day or 2 "*
  · ***Walking package which would include a day/night in each mountain range** which would include a walk, meal experience and an overnight*
  · ***Activities, heritage, food are a good blend** which are part of the brand*
  · ***Combined promotion of local experiences***
  · ***Garden trail***

· **Product and experience development with a focus on the mountains**, with respondents' comments including:
  · *'5 peak family friendly outdoor survival loop. Mix of camping and accommodation, with camp bases set up and either guided or mapped routes. Mix in some of the outdoor activities in each area'.*
  · *'As running has become so popular maybe a women's race up Sliabh na Mban'*
  · *'focus on one product/experience that would connect the mountain ranges and counties together... for example similar to the 'Camino' style of product.'*
  · *'A large-scale mountain themed event. "Music in the Mountains" or Mud Runs are always good.'*
  · *'A dedicated equestrian trail through these mountain ranges.'*
  · *'Introduction of a substantial strip of native broadleaf sylvopasture on the slopes of these mountains and where possible a lowland strip of similar flora linking the mountain ranges. Hiking trails would be incorporated into the scheme, and stakeholders along the way given help in return for their participation (subsidies, help creating low impact chalets, lodges, campsites, parking etc).*

· **Walking and cycling opportunities** on the lowlands/rivers:
  · *The Waterford Greenway has transformed tourism in West Waterford, which in the long term should benefit the whole county. The River Suir is the thread that joins the mountain ranges. The Blue way if correctly managed could do the same for the central Munster Vales area with a knock-on effect for the wider region. Also, developing the East Muster Way and linking it with a wider network of trails (e.g. St. Declan's Path).*

PART FOUR

CASE STUDIES

This section considers four comparable destination management organisations, chosen because they are innovative organisations with a community focus, that involve multiple local authorities, and have relevant lessons for Munster Vales. Transferable lessons for Munster Vales are highlighted, with an emphasis on relationship with stakeholders and board composition and the funding model, including associated membership models. The four case studies include:

Cumbria Tourism, UK
Mid-Wales Tourism, UK
Burren Ecotourism Network, Ireland
Rota Vicentina, Portugal

Cumbria Tourism
At the heart of our visitor economy

4.1 CUMBRIA TOURISM[4]

Cumbria Tourism is the DMO for an area that includes the Lake District and the UNESCO World Heritage site, Hadrian's Wall. It has been in existence in one form or another for approximately 40 years. They operate a trade website, www.cumbriatourism.org and a visitor-facing site, www.visitlakedistrict.com

It currently **has a membership of 2,500 tourism businesses and a staff of 16 people** which has been building over the past 2 years. **Up to 4 years ago, the organisation was funded primarily by the local authorities, but they withdrew funding and from that decision, the current model emerged.**

97% of the membership is derived from the private sector, small and medium businesses, plus a new strategic partners' membership which include suppliers to the industry – banks, web design companies, energy providers. National Parks contribute too, as does a fund from Visit Britain, the Heritage Collection, aimed at attracting overseas visitors to the region. This is a competitive fund and a 3-year programme. The Annual Report shows that in 2019, the income from this was almost the equivalent of the membership subscriptions.

Membership fees are scaled and based on the size and type of business. Basic membership begins at £200 for small accommodation providers and provides for a web listing, commission-based bookability and membership discounts available from the strategic partners. For an extra £145, the premium package allows for a more detailed listing, more images, inclusion of a web address.

Members then pay for any other additional services or activity they want to avail of – from Business Start Up packs that include research and advice for people considering a new business, cost £300, to Tourism Facts & Trends Reports for Cumbria at £80. The model drives the DMO to provide better service and most members buy the additional services because of their quality.

Their primary focus is on Marketing but they, of course, also involve themselves in quality assurance and visitor experience plans. They also operate a **My Cumbria Card** which offers discounts for locals living or working in the area. It is available for £20 plus VAT. Everything Cumbria Tourism does in reporting to its members, stakeholders and strategic partners is evidence based and transparent. They estimate tourism has a value of £3bn to the region.

The organisation had a fulltime research officer, but that role was lost due to budget restriction. They still have access to this person on a contract basis and **place a great emphasis on the power of research, measurement, and reporting**. They believe this has earned them the respect of not only their membership but also of important stakeholders and Visit Britain with whom they now have an improved working relationship.

The selection of board members is somewhat unusual. They request volunteers from key sectors and **the existing directors, and the Chief Executive evaluate the suitability of the candidates**. This has worked to date, but concern was expressed as to how sustainable this will remain.

Annual Cumbria Tourism Awards are held, which helps to raise the profile of the area and to celebrate Cumbria businesses.

Cumbria Tourism host 3 or 4 member meetings per year, plus an AGM. These would typically feature an inspirational speaker or expert to attract attendance and usually get about 120 members to attend. Members value the networking opportunity presented by such gatherings.

Cumbria Tourism is amongst the UK's top DMO's alongside Cornwall and London.

4.2 MID WALES TOURISM[5]

The Mid Wales region is a largely rural, mountainous area spread over 3 counties, each with its own local authority. The region includes the Brecon Beacon National Park, a UNESCO Dyfi Biosphere, Southern Snowdonia, and the Wales Way family of three national walking routes.

Established in 1991 when 3 regions decided to come together to take more control of their destiny and to become more commercial. Nonetheless, it was set up as a Not for Profit company. Core funding came from the Tourist Board, Membership, Local Authorities, and marketing campaigns undertaken. Originally, the concentration was on the region's accommodation and distributing it to the consumer but as OTA's emerged, it became clear that business' profits were being taken out of the region by Bookings.com commission and the availability was being used against them.

In 2001, the Tourist Board decided to cease funding, and, on that basis, the local authorities also withdrew support with the combined loss of 25% of the organisation's funding.

The focus of the organisation then changed and became more business led. Concentration turned to membership and **they recruited national organisations such as the National Trust and other private sector companies**. The result was a more independent organisation.

The emergent DMO had an edge in that they embraced technology and online distribution before many of its counterparts. They provided a standalone platform for their membership and populated the Visit Wales website although few bookings resulted. They maintain two websites – www.visitmidwales.co.uk which is consumer facing and www.mytcymru.co.uk which is their B2B site.

Mid Wales Tourism also changed its positioning and is now doing **more destination messaging**. This is much to the satisfaction of its larger members but is a harder sell to its accommodation providers and smaller businesses. Bigger businesses really value the representation and advocacy, smaller businesses the buying power for things such as card processing. Going back to their technology edge, they also **offer basic website builds for their smaller members, charging £350 to create a business site that includes a simple CMS**.

Membership fees vary slightly according to sector. Accommodation providers are based on size of rooms mainly – with 50+ rooms commanding the highest fee of £350. Local Authorities pay £450. Membership is open to anyone in the region involved or interested in the Visitor Economy. Associate membership is also available to businesses in neighbouring regions.

In the past, there was still a shortfall in Mid Wales' Tourism funding, and they became heavily dependent on identifying projects that would attract grants to make up that shortfall. But this was basically unsustainable and put a strain on limited resources in applying for, delivering, and reporting on these projects. **That is when they determined to attract some larger businesses such as the National Trust.**

Mid Wales Tourism run their own conference and annual awards, enhancing awareness of the destination, raising revenue for the DMO, providing networking opportunities, and celebrating exceptional businesses. T**here is likely an opportunity for a Munster Vales Conference and Munster Vales Tourism Awards.**

Nowadays, they deliver on some contractual work on behalf of Visit Wales, things like business engagements and **now enjoy an improved relationship with the tourist board.**

The board of Mid Wales Tourism is made up of 9 directors with the option to co-opt 3 additional directors to address any lack of representation from any sector. These comprise of **3 from each of the local authorities (not always appointed), 2 elected directors from each of the administrative areas and the option of a further 3 co-opted. Currently, there is representation from each of the main tourisms sectors – visitor attractions, self-catering, accommodation** but there are also two directors who come from supplier businesses – one, a caravan sales company, the other a tableware, cookware and giftware company.

One of the councils in the Mid Wales region, Powys County Council, has set up its own independent tourism website, www.midwalesmyway.com

Mid Wales Tourism is now in existence 30 years. Their Chief Executive prides herself in saying that it is **now more business led than ever in its history.** It has a **membership base of 600 businesses.** She **identifies their embrace of technology as one of the contributors to their success.** They also work closely with Cumbria Tourism.

4.3 BURREN ECOTOURISM NETWORK[6]

First established in 2009, the network originally emerged from the Burren Connect project, an initiative created primarily as a conservation measure to provide visitor management systems in collaboration with tourism enterprises in the Burren. Clare County Council, Fáilte Ireland and others were involved in this pilot project.

In 2011, membership was at 12 businesses and, at that time, BEN moved under the aegis of the Burren Life Project, an EU-funded project with a 3 stranded approach to the Burren management that included farming, conservation, and tourism. This project attracted funding from Europe for a three-year period and allowed for the appointment of an animator to drive the network forward.

Clare County Council and Fáilte Ireland remained involved but were not contributing anything financially at this stage. Fáilte Ireland provided supports in the form of training and mentoring of local businesses, Clare County Council managed the project.

Membership grew to more than 55 businesses, inspired by a common ethos of protecting their natural environment but also the recognition that, to **be successful, they had to collaborate as a network**. Primary benefits to membership was the marketing value to be achieved through the promotion of the destination. A bank of imagery was developed, and individual businesses provided with access to these images to promote their own enterprises as well as the destination.

Funding was a constant problem and as the Burren Life project came towards its end, another submission was made to Leader which allowed for Tina O'Dwyer to be retained for a further 2 years, charged with commercialising the project, developing a business

plan and putting in place solid governance. This imperative arose from the awareness that any donor organisation providing funding required the organisation to be properly run and the realisation that **to be sustainable, they needed to be a more self-sufficient business association**. Otherwise, funding was being sourced through Leader or other programmes with demanding and time-consuming processes to be gone through to draw down funds, imposing unworkable timeframes on project delivery and simply preventing the organisation from being run as a business.

In 2019, the organisation became a Limited Company, business-led and this has allowed them attract sponsorship and improved their funding. **Membership fees represent about 25% of their budget and new private sector businesses are now coming on board, contributing 15%. Clare County Council contribute approximately 20%.** They continue to attract some additional funding under Leader programmes for I.C.T training and some marketing activity. And sell items such as books, etc. that generates a further 10%.

The network host **4 full membership meetings per annum**, plus an AGM. Membership elect the board members, of whom there are 6 but there is an option to appoint a further 3 directors if they are deemed of benefit or have particular expertise.

A Chief Executive was appointed in 2019 and as part of their more commercial focus, **they now measure overnights, especially for their Festivals to win support from Fáilte Ireland.**

Membership fees are based on the number of employees in a business – 1-5, €350, 6-24, €500 and, above that, €750.

4.4 ROTA VICENTINA ASSOCIATION

The Rota Vicentina is a corridor of activity along the Costa Vicentina on the Algarve's west coast. The route consist of two main trails, the Fisherman's Trail which runs from Porto Covo in Alentjo to Odeceixe in the Algarve and its 5 complementary circuits, the Historical Trail which runs from Santiago do Cacem in Alentjo to Cabo Sao Vicente in the Algarve, and five circular routes. Rota Vicentina officially opened in 2012.

The Algarve's Rota Vicentina Association (www.rotavicentina.com) can be considered a relevant best-practice example with regards to its community based structure, funding mechanisms and recent achievements. This not for profit association has **over 150 private sector members** which include accommodation providers, tour operators and taxi companies. **Membership fees are now almost double the amount of annual public sector funding from municipal councils meaning the RVA business model is becoming increasingly sustainable. Funding also comes from sponsorship e.g. Europcar**.

Maintenance of the trail is underpinned by a **strong volunteer network** who sponsor a section of 20km+ and walk it twice a year, reporting problems or carrying out maintenance themselves. Significant maintenance is undertaken by the municipal councils. The Rota Vicentina has very high quality directional, orientation and interpretation signage. There are 26 interpretation panels in villages - the start/end points of 22 sections and on 5 loop trails.

In 2015 Rota Vicentina Association launched a highly informative website with maps available to download in all formats for all sections including GPS, GPX and KMZ formats for use in Google Earth and Google Maps. **High quality printed maps and guides are also available**. Innovative features of the website include **online booking facility** for accommodation; and an **itinerary planner linked to an algorithm** that suggests an itinerary based on the user profile and length of stay.

Key issues and findings concerning Rota Vicentina:
- Innovative use of a private sector led association to drive development of a corridor of activity whose **goal is to increase local economic benefit rather than increase user numbers**;
- There is no visitor data and this **lack of visitor data makes prioritised investment difficult**. Numerical, qualitative, and carrying capacity monitoring would enable RVA to work with sponsors, media and EU funds – it would provide justification for investment. A baseline socio-economic study and carrying capacity study are essential.

4.5 SUMMARY

Some of the case studies no longer receive any funding from local authorities, others have seen no cuts in funding but have seen the contribution decline as a proportion of their revenue due to increased revenue from other sources such as membership and sponsorship. They all say that being business-led has delivered more benefits and made them better organisations. The inclusion of corporate/strategic partners can also deliver member benefits and additional membership fees. A summary of each organisation in included in table 6.

Some approaches and actions that are of relevance to, and could be applied in the Munster Vales context include:

- A membership fee to provide a revenue stream and encourage buy-in, using the example from all four DMO's;
- Paid services such as research, PR, other marketing activities, drawing on the Cumbrian Tourism and Mid-Wales Tourism examples;
- A Munster Vales card that would provide discounts and offers, drawing on the Cumbrian Tourism example;
- Joint buying power for members, using the Mid Wales example;
- An enhanced networking model, using the Cumbria Tourism approach;
- Research into the economic value of marketing to provide tangible proof of impact to members, as with Cumbria Tourism and Burren Ecotourism Network,
- An annual Munster Vales conference and Munster Vales Awards, drawing on examples from Cumbria and Mid-Wales Tourism;
- Online booking as with Rota Vicentina.

Table 6 Summary of Destination Management Organisations

	Cumbria Tourism	Mid Wales Tourism	Burren Ecotourism Network	Rota Vicentina
Funding Background	Local authority partners withdrew funding 4 years ago.	Tourist Board and Local authority partners withdrew funding 2001. More business-led now.	Board decision made to become more business led. Became Limited Company with Chief Executive in 2019	Five local authority partners. Revenue from membership now more than 50% of total revenue. Sponsorship important
Membership Profile	97% private sector, small business operators. Strategic Partners, suppliers into the industry. National Trust.	Small businesses but also national organisations such as National Trust and other strategic partners.	Growing membership of local businesses. For first time, new corporate sponsors coming onboard with shared ethos to theirs.	Growing membership of local businesses. Sliding scale of membership fees
What makes them different?	Basic membership fee, Standard or Premium, priced accordingly. Charge extra fees for additional services - research, PR, other marketing activities	They deliver programmes on behalf of Visit Wales for which they charge them a fee. Associate membership for businesses in neighbouring areas. Early in their existence, they embraced technology and still offer members a fee-based service to build their basic website that gets them online.	Focus on conservation attracts additional EU funding opportunities.	Strong focus on encouraging overnight stays in settlements along the walking route. Accommodation and experiences bookable through the website, with a call to action to maximise revenue for businesses i.e. as an alternative to booking.com
Measures that could be adopted by Munster Vales	Membership fee Paid services My Cumbria card Networking model Strong research Cumbria Tourism Awards	Membership fee Paid services Joint buying power for members Annual conference and awards	Membership fee Strong networking Measurement of overnights	Membership fee Online booking Destination map Volunteer network

PART FIVE

ECONOMIC ASSESSMENT

Establishing the economic impact of Munster Vales as an entity currently would not be possible as:

- There are a wide range of businesses located within the boundary across the four local authority areas,
- These businesses would not be able to distinguish the economic impact of activities undertaken by Munster Vales as destination management organisation, **as distinct from for example their own marketing, word of mouth, promotion by Fáilte Ireland, county tourism bodies, or through media articles.**

The only way in which direct economic benefit from Munster Vales activities, over and above other activities, could be measured were if accommodation, activities etc could be **directly booked through the Munster Vales website**, or through use of for example a **Munster Vales card** which gave visitors discounts, as used by other destination management organisations.

However, an estimate can be made of the value of tourism within the Munster Vales area based on the number of tourism businesses and a range of assumptions. These are shown in Figure 7-9. It is acknowledged that this list may not be exhaustive.

It should be noted that some AirBnB properties are not approved tourism accommodation, although some have the Welcome standard. While they are included for the purposes of estimated revenue, they are not promoted as part of Munster Vales activities.

Accommodation Sector

	Approved Accomodation - Category	Total Number Per Accomodation Type	Estimated Rooms/Units Per Accomodation Type	Estimated Average Occupancy Per Accomodation Type	Estimated Average Opening Days Per Annum Per Accomodation Type	Estimated Average Accomodation Cost/Visitor Spend Per Day	Estimated Average Total Accomodation Revenue
Approved Accomodation	Hotels	31	20	70%	310	€120	€16,665,600
	B&B	44	8	70%	120	€100	€2,956,800
	Caravan and Camping	8	15	50%	160	€30	€288,000
	Self Catering	13	5	70%	280	€100	€1,274,000
	Hostel	5	10	70%	220	€70	€539,000
Non-Approved Accomodation	Hotels	1	20	70	320	€120	€537,600
	B&B	23	8	70	140	€100	€1,803,200
	Caravan and Camping	1	15	50	220	€30	€49,500
	Self Catering	10	5	70	140	€100	€490,000
	Air BnB	100	3	70	260	€70	€3,822,000
Estimated Total Accomodation Revenue							**€28,425,700**

Figure 7 Indicative Revenue from Accommodation

Attractions Sector

	Attractions	Total Number Per Attraction Type	Estimated Avergage Daily Visits Per Attraction	Estimated Avergage Opening Days Per Annum Per Attraction	Estimated Average Attraction Spend Per Visit	Estimated Average Total Attraction Revenue
Attractions	Historic Houses and Castles	37	600	160	€15	€53,280,000
	Museums and Attractions	29	500	140	€30	€60,900,000
	Churches, Abbeys and Monasteries	16	200	260	€15	€12,480,000
	Gardens	19	80	80	€20	€12,160,000
	Art Galleries and Theatres	6	140	140	€20	€1,680,000
Estimated Total Attractions Revenue						**€140,500,000**

Figure 8 Indicative Revenue from Attractions

Activities Sector[7]

	Activity Providers	Total Number Per Activity Type	Estimated Avergage Daily Visits Per Activity	Estimated Avergage Opening Days Per Annum Per Activity	Estimated Average Activity Spend Per Visit	Estimated Average Total Activity Revenue
Activities	Activity Operators	30	400	100	€25	€30,000,000
	Waterford Greenway	1	300	260	€35	€2,730,000
	Beach and Watersports	7	400	260	€5	€2,240,000
	Angling Operators/Guides	14	200	100	€20	€5,600,000
	Equestrian	9	200	220	€15	€5,940,000
	Golf Course and Ranges	11	800	140	€25	€30,800,000
	Tour Guides/Operators	18	300	180	€20	€19,440,000
Estimated Total Activity Revenue						**€96,750,000**

Figure 9 Indicative Revenue from Activity providers

Sector	Indicative spend (€)
Accommodation	28,425,700
Attractions	140,500,000
Activities	96,750,000
Total	**265,675,700**

"Combining the indicative direct visitor revenue and the indirect and induced benefits gives a figure of €665mn as a value of total economic impact from tourism expenditure within the Munster Vales area."

Based on Fáilte Ireland data indicating that approximately 27 jobs are generated for each €1m of tourism expenditure, **this indicates 7,182 jobs are based on tourism in the Munster Vales area**. Fáilte Ireland further indicate that for every euro spend on tourism (domestic and overseas, 23c is generated in tax. **This indicates that tourism within the Munster Vales area is worth approximately €61m to the Irish exchequer annually.**

Indirect and Induced Benefit
Using an accepted multiplier of 1.5 it can be estimated that the indirect and induced benefits of **visitor expenditure within the Munster Vales area is worth €399m to the regional economy.**

Economic Impact	€266m
Multiplier	1.5
'Direct, Indirect and Induced' Benefits - Impact to Output	€399m

Total Economic Impact
Combining the indicative direct visitor revenue and the indirect and induced benefits gives a figure of **€665mn as a value of total economic impact from tourism expenditure within the Munster Vales area.**

However, it is acknowledged that some data may already be out of date, and it can be difficult to provide an accurate assessment, particularly in the context of Covid-19. There is an opportunity to address future assessment of economic impact in greater detail, to enable Munster Vales to provide more accurate data on an annual or bi-annual basis.

Direct benefit of visitor-related expenditure	€266m
'Direct, Indirect and Induced' Benefits - Impact to Output	€399m
Overall Total Impact	€655m

Summary
The following comments can be made with regards to the economic value of tourism in the Munster Vales area:

· Tourism is estimated to generate **€266mn in revenue** annually;
· This revenue can be expected to support **7,182 jobs based on tourism**;
· Tourism within the Munster Vales area is worth **€61m to the Irish exchequer** annually;
· Indirect and induced benefits of visitor expenditure within the Munster Vales area is worth **€399m to the regional economy**;
· Combining the indicative direct visitor revenue and the indirect and induced benefits gives a figure of **€665mn** as a value of total economic impact from tourism expenditure within the Munster Vales area.

PART SIX

STRATEGIC ISSUES SUMMARY

STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS.

STRENGTHS

Munster Vales brand established including strong digital presence

Motivated and respected team in place
Munster Vales Board working well together

Local authority buy-in to the concept

Multiple awards won

Munster Vales enables the four county councils and the tourism businesses within them to market and develop the area collaboratively using economies of scale

Networking and engagement with communities and businesses since inception

Strong delivery of training courses which are well received

Spectacular scenery and wide range of attractions and activities from nationally significant heritage to looped and linear walking routes, Suir Blueway Tipperary, Suir Greenway, Waterford Greenway

Wide range of topography within one destination e.g. – spectacular coast, large rivers (Blackwater and Suir), six mountain ranges, and tranquil lowland areas

Good access into the area via M8 motorway and regional roads as well as rail corridor and bus network

WEAKNESSES

Lack of saleable experiences available – it is difficult for visitors to 'buy' Munster Vales

Lack of an iconic attraction, particularly in the southern part of Munster Vales

Lack of a Munster Vales map, or Munster Vales cycling and walking maps

Limited internal capacity for development

Limited funding for marketing

Lack of buy-in from some industry members

Difficult for visitors to visualise the destination

Need for clear focus on delivery

Lack of trade representation on the Munster Vales board

Munster Vales currently unable to quantify value of activities to trade and communities

Some businesses and communities not aware of work undertaken by Munster Vales

Insufficient focus on the mountains as a unique selling point

Lack of accommodation in some areas

No data collection, no current measurement of impact

Lack of regular engagement with trade / membership

Not sufficient business / industry representation on the board

Reliance on public sector funding

OPPORTUNITIES

Development and promotion of distinct Munster Vales experiences and development of a Munster Vales Experience Route

Munster Vales can develop local experiences encouraging regional dispersion, tapping into key Fáilte Ireland objective

Identification of small number of ambitious projects that link the mountain ranges and raise the profile of Munster Vales e.g. walking and cycling routes

Extension of Waterford Greenway to Carrick-on-Suir to increase number of visitors to towns and village in Munster Vales

Tapping into investment and promotion associated with regional brands to maximise national spend opportunity

Range of funding schemes available for capital projects which could be used for Munster Vales initiatives

Update website so it becomes more effective route to market with bookable options to partners to demonstrate value

Visitors seeking open air destination and experiences in Covid-19 context

Introduction of roadmap for membership fees could grow revenue and encourage buy-in

THREATS

Challenge to maintain ongoing funding from local authorities which is essential for Munster Vales to continue

Local authorities have their own tourism brands and strategies, important for Munster Vales to stay relevant

Fáilte Ireland and strategic partners focus is on regional brands, important for Munster Vales to stay relevant in this context

Multiple brands could confuse visitors e.g. regional brands, county brands and Munster Vales

Impact of Covid-19 and Brexit on the tourism industry, particularly overseas visitors

Lack of resourcing to capitalise on opportunity to engage domestic market in a post-Covid context

Lack of signage and facilities

Inability to demonstrate value leading to potential community disaffection with concept

PART SEVEN

VISION, RECOMMENDATIONS AND ACTION PLAN

7.1 VISION AND GOALS

The **competitive advantage** of Munster Vales as a destination, over other similar traditional rural areas in Ireland with strong natural and cultural heritage, are the **recreational opportunities** provided by the mountain ranges, the rivers, coast, and the lowland areas or vales between the ranges. The opportunity to combine adventure activities, particularly walking and cycling, with visits to towns and villages as well as a wide range of built heritage sites within the area, while meeting local people and experiencing cultural events, is of strong appeal to key target markets for Munster Vales, particularly the Culturally Curious target market segment. A further competitive strength is the **collaborative nature of Munster Vales** in uniting four local authorities in the development of the destination.

The proposed vison statement, based on this competitive advantage, is:

The vision of Munster Vales is to promote, support and connect communities and rural tourism businesses offering a wealth of heritage, outdoor and visitor experiences across five mountain ranges in Cork, Limerick, Tipperary & Waterford.

Munster Vales should not seek to replicate or displace the functions of county or regional brands or of the product development initiatives of the private or public sectors. Each local authority now has their own tourism unit, with a strategic plan and associated marketing and product development objectives. In turn Fáilte Ireland will continue to prioritise investment in the promotion and development of the regional brands of Ireland's Ancient East and Wild Atlantic Way. **The strategic direction, and motivation for actions, must harness the power of collaborative investment and support**.

The aim of this strategic plan for Munster Vales is to **increase visitor numbers and visitor revenue in the towns, villages, and tourism businesses within the destination**, supporting a sustainable rural economy based on low-impact activity tourism, through harnessing collaborative investment and support.

The **strategic approach is framed by three strategic priorities and nine high level goals** as illustrated in table 7 which provides an overview. Further detail on **recommendations** is provided below in section 6.2. Actions are outlined in section 6.3. The focus is on appropriate and achievable actions that will achieve the goals, and that focus on growing the Munster Vales brand, supporting the development of existing and new visitor experiences, and increasing revenue growth from overseas and domestic visitors.

Strategic Priority	Goal	Actions
Stakeholder and Community Engagement	1 To facilitate community and business engagement	Covid-19 response **Munster Vales Board** (composition review, focus groups) **Engagement** (community engagement pilot programme, enhanced network meetings, fam trips) **Capacity Building** (training needs assessment, online digital marketing course)
	2 To increase demonstrable socio-economic benefits from tourism	**Demonstrating Value** (visitor and business survey, information on value to members)
	3 To ensure adequate long-term resourcing of Munster Vales	**Resourcing** (membership model, staff resources)
Visitor Experience Development	4 To create compelling visitor experiences	**Munster Vales Experience Route** **Munster Vales Challenge** **Munster Vales Trails** (Munster Vales Food & Craft Trail, Munster Vales Garden Trail, Munster Vales Heritage Tour)
	5 To consider initiatives to unite the destination and to attract more visitors	**Walking Initiatives** ('Munster Vales Way', maps and app) **Cycling Initiatives** ('Munster Vales Greenway', maps and app) **Angling, equestrian and canoe/kayak Initiatives** **Munster Vales Green Corridor**
Visitor Awareness, Motivation and Engagement	6 To raise awareness of Munster Vales as an outdoor activity destination	**Marketing Delivery** (marketing programme, tagline)
	7 To make Munster Vales visible	**Destination Gateway Hubs** **Digital and Print Media** (maps and brochures)
	8 To promote online saleable experiences	Online booking of tailored packages/options

Table 7 Munster Vales Strategic Priorities and Goals Overview

7.2 RECOMMENDATIONS

Strategic Priority One: Stakeholder and Community Engagement

Goal 1: To facilitate community and business engagement

Covid-19 will have a long lasting and transformational impact on the tourism industry of Ireland, from which the industry may take years to recover. This strategy has been written with consideration of such impacts and has sought to identify opportunities for businesses in Munster Vales, such as the potential for visitors to seek safe and outdoor destinations. The priority for the first year to two years of the strategy must be to support the existing businesses within the Munster Vales area in the context of Covid-19. It will be important that **Munster Vales tourism providers are provided with information on supports available to assist their businesses**. There has been international coverage of post-Covid tourism trends. One such trend is the desire for safe destinations, attractions, accommodation etc. With Fáilte Ireland now rolling out the **COVID-19 "safety charter" stamp**, that hospitality and tourism businesses can display on their premises and websites to assure customers that their properties are safe spaces, it is recommended that Munster Vales encourage businesses and communities in the area to implement this initiative to instil customer confidence.

It is strongly recommended the composition of the Munster Vales Board be reviewed with **enhanced representation of local communities and tourism businesses on the Munster Vales Board**, without increasing the number of board members. Board members bring considerable experience to Munster Vales and the use of **focus groups**, with specific tasks such as community engagement, experience development or advocacy, can help utilise this experience to the full.

The groundwork is now in place, including administrative frameworks, branding, website, and digital marketing. The next stage should be about building upon these strong foundations and harnessing collaborative opportunities at a local, county, and regional level. The Munster

Vales Board provides an opportunity to identify opportunities for the four local authorities to work together over the course of the strategy. Opportunities to develop collaborative experiences including existing ones, those proposed in this plan, and new ones arising during the plan period should be considered by an experience development sub-group of the Board.

The significant work that has been undertaken to build a strong network of tourism stakeholders in the Munster Vales area is acknowledged. It is recommended that that this **network is further strengthened** through a community engagement pilot programme, including mentoring around how communities can maximise opportunities presented by the Munster Vales brand; and through **more focused network meetings**, drawing on experience of other similar events.

Emphasis on community engagement is important because Munster Vales is a large area and it takes time to connect with communities and to continue to build support. **Munster Vales is essentially a bottom-up organisation; a collaborative marketing and development tool for the benefit of tourism businesses and communities in the area.** To maximise the opportunity this presents it is therefore essential to connect and involve as many businesses and communities as possible.

The southern boundary of the Munster Vales area, to the south of the N72, could be considered too restrictive. It is recommended that consideration be given to **moving the Munster Vales boundary further to the south**, on a line from Rathcormack to Dungarvan, to take in Conna, Tallow, Villerstown and the Blackwater valley. This would facilitate greater engagement of tourism businesses in the area and widen the range of experiences on offer within Munster Vales.

Munster Vales can play a key role in **strengthening the capacity of the tourism industry across the destination**, by acting as a conduit to draw support from Fáilte Ireland, local authorities, development agencies, and funding schemes. It is recommended that a **training needs assessment** is undertaken in partnership with LEO's, beginning with a selection of key businesses, with training sourced that can fulfil identified needs.

It is recommended that, as a priority, and as part of the training needs assessment, Munster Vales engage in a **digital audit** of tourism businesses to ascertain

how many are online and have booking capability, which platforms they use etc.

It is essential that high quality rural broadband is implemented, to enable businesses to maximise opportunities and to connect with customers, and to enable visitors to discover experiences in the Munster Vales are while in the area, and to post content online. **There is a role for Munster Vales to advocate for implementation of rural broadband on behalf of rural businesses and communities**.

It is further recommended that **internal fam trips**, similar to those undertaken by Ballyhoura development, and Burren Geopark, are introduced for the Munster Vales, thus enabling businesses to promote first-hand the breadth of the experiential offer within the Munster Vales area.

Goal 2: To increase demonstrable socio-economic benefits from tourism

The focus must be to attract more visitors to the area, and particularly to less visited places that would benefit from increased visitor revenue. Destination management organisations, discussed in Section Four, place significant emphasis on demonstrating value for communities and business in their destinations. To date there is no tangible means of demonstrating the value of the wide range of marketing and networking undertaken by Munster Vales to the communities and tourism industry.

As discussed in Part Five, it is recommended that **tangible proof of economic impact is demonstrated** through an annual visitor and business survey, and through bookable experiences on the Munster Vales website (see Goal 8). It is recommended that **relevant data from such surveys and from online interaction should be disseminated to the Munster Vales network**.

It is recommended that Munster Vales **negotiate preferential rates** on behalf of members (see Goal 3 for details of membership programme) e.g. preferential credit card commissions, printers, etc, delivering real tangible benefit to small businesses.

Goal 3: To ensure adequate long-term resourcing of Munster Vales

Munster Vales represents a significant opportunity for tourism stakeholders. For local communities and tourism businesses Munster Vales provides a voice, a route to training and development, and a route to market. For Fáilte Ireland and local authorities this too means the development of local networks, capacity building, experience development, and a regional scale of tourism development focussed around a rural tourism and activity theme, one that is aligned with county tourism strategies and with the themes for regional brands. Ultimately the over-arching goal for all tourism stakeholders is the same, to encourage regional spread of tourism and to extend the tourism season, providing benefits to local communities and businesses. However, it is **essential that sufficient resources are ring-fenced to capitalise upon the opportunity presented by Munster Vales over the course of this plan, and that a long-term roadmap is identified, creating a more collaborative and viable organisation**.

It is recommended that a membership model be introduced based on demonstration of value of Munster Vales to members. The **collaborative funding roadmap** should be based on the model shown in Table 8. While this strategy covers a 5-year period it is considered important to illustrate a longer-term view for this critical issue.

It is recommended that the amount provided by local authorities does not reduce over the next ten years, but that the funding provided by the public sector decline as a proportion of overall Munster Vales revenue, due to an increase in revenue generated through membership fees, and other means of raising revenue, such as grants, conferences, sponsorship and local fund raising. Private sector funding and sponsorship should be considered as a complementary funding avenue. The increase in revenue, and demonstration of value (see Goal 2) should be utilised to **increase staff resources** e.g. a marketing officer, development officer, and administrative support, and to invest in marketing to target overseas visitors.

Table 8 Indicative Collaborative Funding Roadmap

Year	Local authority funding (% total revenue)	Membership fee (% total revenue)	Other funding (e.g. grants, conference, fundraising, sponsorship) (% total revenue)
2021	100	0	0
2022	90	5	5
2023	85	10	5
2024	80	15	5
2025	75	20	5
2026	70	25	5
2027	62.5	30	7.5
2028	55	35	10
2029	47.5	40	12.5
2030	40	45	15

Strategic Priority Two: Visitor Experience Development

Goal 4: To create compelling visitor experiences

The objective will be to **enhance existing experiences and to develop a range of new compelling and authentic visitor experiences that act as a hook to bring visitors to the area and encourage them to stay overnight, and to stay for longer in the towns and villages of Munster Vales**. A core focus will be upon walking, cycling and unique rural tourism experiences. Experiences must be aligned not only with the theme of Munster i.e. outdoor activity tourism, heritage, and community-based tourism, but also **aligned with regional brand themes** i.e. Ireland's Ancient East and Wild Atlantic Way, to attract investment and promotion from Fáilte Ireland.

It is recommended that Munster Vales initially target 10-15 key businesses in the area with an emphasis on inter-county linkages, identify experience gaps, and **work to help them develop compelling visitor experiences. It is strongly recommended that Munster Vales work together with Fáilte Ireland** in this, harnessing national experience in developing compelling visitor experiences, ensuring that they are aligned with the regional brands and key visitor target segments, and thus enabling associated promotion and investment from Fáilte Ireland. It is recommended that visitor experiences are linked along **a Munster Vales Visitor Experience Tour**, enabling associated branding and promotion. The objective should be to encourage visitors to stay overnight in towns and villages along the route and to ideally engage in experiences over a few days. As one of a range of initiatives to link the mountain ranges together, and encourage increased overnight stays in the area, it is recommended that a **distinctive mountain Munster Vales Challenge** be introduced, driven by the private sector with promotion and engagement by Munster Vales. This could take the form of a:

· **Five-peak family friendly outdoor survival loop**, that includes a mix of camping and accommodation with camp bases set up and either guided or mapped routes. This could also include options for some of the outdoor activities in each area.

· **Five peak adventure race** (Munster Vales Five Peak Challenge), an adventure race that includes running, mountain-biking (Ballyhoura), and kayaking (Suir).
· **Women's running race up Sliabh na Mban.**

Promotion of such a race would highlight the outdoor activity opportunities in the area, provide a vehicle to raise the profile of Munster Vales, and encourage more people to stay in the area. This is envisaged to be a private sector led initiative supported by Munster Vales.

Each county within the Munster Vales have elements of food and craft trails. It is recommended that consideration be given to linking the artisan food, drink, and craft producers in the area as a **Munster Vales Food and Craft Trail**. There are also beautiful gardens within the Munster Vales such as Ballylin Gardens in Lismore, Dromana House and Gardens, Terra Nova fairy Garden, and Cappoquin Houe and Garden. These feature on the Waterford Garden Trail and Ballyhoura Garden Experience. As an initiative to highlight, promote and unite the destination it is recommended that a **Munster Vales Garden Trail** be promoted with print and digital maps available. Open spaces such as these are likely to appeal to visitors in a post Covid-19 climate.

There is further potential to consider promotion of the Waterford-Clonmel-Limerick Junction rail line as a scenic day trip. This line has been promoted as one of the most scenic rail journeys in Europe.

While there are scenic drives within the Munster Vales, there is no single route that is consistently signed covering the entire Munster Vales. It is recommended that a branded **Munster Vales Heritage Tour** be developed. This touring route would encompass the 'best parts' of the existing driving routes, will be easier to market and allow tourists to experience the entire Munster Vales in one go and help increase length of stay and revenue. Promotion of such a route, including associated imagery, stories, etc would enable the geographic extent and concept of Munster Vales to be promoted without the need for 'Welcome to…' style signage. Indeed, signage may not be required with the trail promoted online only. There is additional potential for the development of multiple routes, rather than one defined route, and for this to be identified on an app, rather than fixed signage. An indicative route for the Munster Vales Heritage Route is shown in Figure 10.

Figure 10: Munster Vales Heritage Route

Goal 5: To consider initiatives to unite the destination and to attract more visitors

Walking/hiking and cycling are activities that appeal to key target markets in the international and domestic audience. They are also activities that can showcase the spectacular scenery with the Munster Vales.

Munster Vales Way

With the objective of encouraging more overnight visits, and of identifying a collaborative initiative that can unite the mountain ranges that characterise the Munster Vales, it is recommended that a feasibility study is commissioned to enable a **Munster Vales Way** to be created that would start/finish in Carrick-on-Suir, Co. Tipperary/Kilfinane, Co. Limerick. The route while promoted as the Munster Vales Way would consist of the following route:

- **East Munster Way:** Follow the 75km East Munster Way from Carrick-on-Suir to Clogheen via Clonmel;
- **Blackwater/Avondhu Way:** Follow the Blackwater/Avondhu Way from Clogheen to where it turns sharp south-west for Kilwort to the south of Kilbeheny (with an option to carry to Fermoy, Co. Cork or to the end of the 168km route at Bweeng, Co. Cork);

- **Kilbehenny-Anglesborough:** Follow local roads from the Blackwater/Avondhu Way to Kilbehenny (or sections of off-road if farmers are agreeable and quiet boreens such as Curraghavoe townland); continue on the Anglesborough road; enter the foothills of the Galtees at Knockwannia and Benard where there are a network of local boreens and Coillte trails;
- **Anglesborough-Moorabbey:** Continue from Anglesborough to Moorabbey on local roads to connect to the Ballyhoura Way;
- **Ballyhoura Way:** Here there would be an option to continue north-east to Tipperary Town, and the start of the Ballyhoura Way at Limerick Junction, or to continue south-west to Kilfinane (with accommodation options at Kilfinane, Kilmallock and Charleville), and on to the end of the Ballyhoura Way at Liscarroll.

This route would take in the four counties, mountains, and the valleys in between. This route has the advantage of combining stretches of existing walking routes, however further feasibility, and development work, including landowner consent/permissive access agreements, may be required between the Knockmealdowns and the Ballyhoura Way. The indictive route is shown in figure 9. This is for discussion purposes only and there would need to be detailed engagement with stakeholders and landowners along any such route as part of a feasibility study.

Figure 11 Indicative Munster Vales Way

Linkages

Having developed such a walk there are a range of further options that could be considered including:

- **Experience packages** could be developed for this collaborative staged route that could include a day/night in each mountain range with a walk and overnight accommodation/meal.
- **Transport linkages**, including public transport could link different stages of the trail.

Maps, Apps and Counters

It is recommended that existing and future walks within the Munster Vales are identified on an engaging **Munster Vales Walking and Cycling Trails Map**. This should be developed in print and online versions and be available to download from the Munster Vales website. A **Munster Vales Walking and Cycling Trails app** could provide detail for those who wish to download offline maps.

To measure the impact of walking trails promotion it is recommended that **trail counters** are installed on key routes at selected locations. This would enable monitoring over time leading to better decision making.

Cycling

Cycling is rapidly growing in popularity, particularly in a Covid-19 context. The Waterford Greenway has been transformational in terms of raising he profile of County Waterford, attracting around 250,000 users annually. It is recommended that consideration be given to **extending the Waterford Greenway from Kilmacthomas, Co. Waterford to Carrick-on-Suir, Co. Tipperary**. This distance of 20km would require a feasibility analysis and landowner consent. It would have the advantage of linking the **Waterford Greenway with the Suir Blueway Tipperary**.

This would then link the cycle route to the river based

Suir Blueway Tipperary from Clonmel to Cahir, linking the Waterford Coast with the River Suir. This amenity, developed on a phased basis, would maximise the recreational opportunity presented by the considerable public investment in each initiative. A range of **packages, experiences and transportation linkages** could then be developed, in a similar way to that proposed above for the Munster Vales Way.

Munster Vales Greenway

As a flagship experience for Munster Vales it is recommend that a feasibility study is commissioned into the development of a **Munster Vales Greenway**. This facility would build on the success of the Waterford Greenway, and recent investment in the Suir Blueway Tipperary. The route would consist of the following:

- Existing Waterford Greenway from Dungarvan to Kilmacthomas;
- Kilmacthomas to Carrick-on-Suir along new extension of the Waterford Greenway;
- Existing Suir Blueway Tipperary from Carrick-on-Suir to Clonmel;
- Extension of the Suir Blueway Tipperary from Clonmel to Cahir;
- Alongside existing rail line from Cahir - Limerick Junction – Charleville – Mallow;
- Along or near the former rail line from Mallow – Fermoy – Lismore – Dungarvan (funding was recently announced for an options selection and project appraisal report for a 38.5km section from Dungarvan to the Cork County boundary west of Ballyduff Upper).

KEY

	Railway
	Railway Station
	Munster Vales
	Views
	Information Points

Waterford Greenway (exisiting)
Waterford Greenway Extension (proposed)
Suir Blueway (exisiting)
Suir Blueway Extension (proposed)
Greenway alongside existing rail line (proposed)
Greenway alongside or near former rail line (proposed)

Existing Cycle Route
Proposed Cycle Route
Kayak and canoe route

Figure 14 Proposed Munster Vales Greenway (Indicative route for discussion)

Figure 12 Historic rail line routes

Figure 13 Current rail routes

The indicative route of the Munster Vales Greenway is show in Figure 14. **It must be stressed that this is for discussion purposes only and there would need to be detailed engagement with stakeholders and landowners (e.g. permissive access) along any such route as part of a feasibility study**.

While acknowledging that further feasibility work would be required, Iarnród Éireann have indicated that they are in principle supportive of such initiatives and would be happy to engage with Munster Vales to investigate the feasibility of this concept further.

Local and Regional Benefits

The route would require a feasibility study and would require commitment and investment from each of the four local authorities. However, this would be:

- a transformative tourism project for the Munster Vales area
- capable of uniting the Munster Vales as a destination, linking the mountain ranges;
- a demonstration inter-county partnership project;
- capable of driving local economic benefit from tourism in the towns and villages along the route;
- Provide an amenity for value for both local communities and visitors;
- Reinforce the transport route hub function of rail stations along the route, making service such as provision of cafes at rail stations more viable;
- Provide opportunities for local employment in towns and villages along the route;
- Encourage increased numbers of overnight visitors to accommodation along the route.

Intra-regional Benefit

This initiative would be capable of a wider intra-regional benefit, in that there would be potential to continue the route from Limerick Junction to Limerick City; thereby creating a Greenway route from Rosslare to Limerick City, linking the South East Greenway/Region/Ireland's Ancient East, to the Western Region/Wild Atlantic Way.

Maps and Apps

It is understood that Munster Vales have to date marketed existing cycle trails in terms of fam trips, print media, through the Munster Vales website and social channels. There is a further opportunity to provide better information regarding on and off-road cycling in the area through use of maps, downloadable cycle routes and better on-road signage. This combined with the provision of better cycling facilities for visitors, and through implementation of infrastructure such the initiatives described earlier as well as bike parking in towns and villages, could encourage greater use of cycling routes in the area. As indicated earlier it is recommended that a **Munster Vales Walking and Cycling Trails Map** be created. This should be developed in print and online versions and be available to download from the Munster Vales website. A **Munster Vales Walking and Cycling Trails app** could provide detail for those who wish to download offline maps.

Angling

Angling as an activity is promoted but not actively developed by Munster Vales. The area contains some of the finest game and sea angling in the country, with one of the best tackle shops nationwide at Clonanav Fly Fishing. There is a further opportunity for Munster Vales to work with Inland Fisheries Ireland (FI) and local angling clubs to promote and manage the area in the most effective way possible to encourage greater numbers of anglers to come to the study area. This includes **making day licences easier to obtain** (e.g. through a link on the Munster Vales website) and **enabling better access to rivers and lakes**. Enhanced angling infrastructure could also encourage greater participation e.g. through provision of floating stands similar to the Lough Derg Ballina Project.

"So-called 'parallel greenways' — cycle paths built within the alignment of existing 'live' rail lines —are a feature in many countries and can form part of the solution when identifying routes that can form part of a national network. We have none in Ireland, despite Irish Rail having no issue with them" and "Existing railway alignments can often accommodate greenways without having to acquire extra lands —the so-called 'rails with trails' model that is so successful elsewhere but that is almost never used in Ireland. An occasional passing train does not make such parallel greenways any less attractive to users."

http://npf.ie/wp-content/uploads/0919-John-Mulligan.compressed.pdf

EQUESTRIAN

In addition to promoting equestrian centres and location of routes as part of promotion of the overall experiential offer in Munster Vales; there is an opportunity develop a major equestrian experience in the area through development of a an **equestrian trail in the Knockmealdown Mountains**, linked to accommodation hubs, for which a feasibility assessment would be required.

CANOE & KAYAK

Development of the Suir Blueway Tipperary kayak/canoe trail and associated infrastructure between Clonmel and Cahir, e.g. through an activity centre, provides a significant opportunity to **promote this activity in conjunction with other outdoor activity experiences**, and in tandem with accommodation.

MUNSTER VALES GREEN CORRIDOR

Green corridors is a continuous area of habitat that connects wildlife populations that are otherwise separated by human activities. These corridors increase biodiversity and provide opportunity for recreation. The importance of broadleaf native forest is recognised by Coillte with the launch of Coillte Nature in 2019 . It is recommended that a **substantial corridor of native broadleaf forest be established on the slopes of each of the Munster Vales mountain ranges, and that where possible these be linked by a lowland corridor of similar flora between each range**. Overtime a range of walking trails could be developed along the corridor with associated opportunities for interpretation, and local economic benefit through campsites, forest-based accommodation, guided tours etc. It would be essential for the Munster Vales Board to engage with Coillte in discussions on this.

SUMMARY

This goal includes a range of recommendations, some of which relate to infrastructure and some that have a more marketing focus.

Those that are infrastructural, and mostly require further feasibility work include recommendations proposed in relation to:

· Munster Vales Way
· Transport linkages for the Munster Vales Way
· Munster Vales Greenway
· Installation of further trail counters
· Knockmealdown Mountains equestrian trail
· Munster Vales Green Corridor

Those that relate to marketing include recommendations proposed in relation to:

· Experience packages for the proposed Munster Vales Way
· Munster Vales Walking and Cycling Trails Map
· Munster Vales Walking and Cycling Trails app
· Experience packages for the proposed Munster Vales Greenway
· Making day angling licences easier to obtain e.g. through a link on the Munster Vales website
· Promotion of experience packages for watersports

Strategic Priority Three: Visitor Awareness, Motivation and Engagement

Goal 6: To raise awareness of Munster Vales as an outdoor activity destination

The objective will be to raise the profile of Munster Vales as an outdoor activity destination in the domestic and international markets. Most of those contacted as part of the strategic conversations, undertaken to inform this strategy, remarked that the marketing programme undertaken to date, including digital marketing, has been excellent and should be continued. It is recommended that a **3-year programme** is devised focussing on the outdoor activities and distinctive local experiences on offer within the Munster Vales. This should include existing attractions and activities, as well as new experiences as outlined in this strategy. Consideration could be given to demonstrating what could be achieved with a larger marketing budget. The target audience for Q42020/Q1-2 2021 is recommended to be primarily a domestic audience, with an international audience growing in 2021-2022 on.

It is recommended that a **new tagline** be considered for Munster Vales, e.g. replacing 'Munster Vales - An authentic slice of rural Ireland' with **'Munster Vales - Find Your Space'**. This would tap into the domestic market's focus on safe open-air uncrowded destinations.

Goal 7: To Make Munster Vales visible

There are a range of initiatives that can be suggested to make visitors more aware of Munster Vales as a destination. There are a range of gateways to the Munster Vales which can be targeted for promotional material, thus providing visitors with clearer information on the destination. It is recommended that, as a first phase, a series of **dedicated interactive Munster Vales digital screens** are installed at key visitor touch points at destination gateways, motivating visitors to stay longer and see more. These gateways are those places where visitors and residents will see them

e.g. within towns that are strategically located, with transport connections, and that have accommodation and services. Optimum locations would be hotel foyers or rail/bus stations.

It is recommended that, perhaps as a second phase, **Munster Vales Hubs** be established in key locations Munster Vales e.g. Clonmel, Dungarvan, Charleville, Fermoy. These facilities would provide information on a range of accommodation, activities, and attractions within Munster Vales. It is recommended hubs use audio-visual technology and photography to 'sell' the idea of a visit to the area, incorporating Munster Vales branding and imagery (perhaps operating as digital only hubs to reduce staff costs). These would not seek to replace Fáilte Ireland visitor information offices and would be independent of Fáilte Ireland. The key aim of this initiative should be to get more people staying for longer in the destination. This could be combined with **Munster Vales Ambassadors**, people who can provide engaging information on things to see and do within the Munster Vales area.

It is recommended that a more engaging **visitor map of Munster Vales** is developed for handout at accommodation providers, and in digital format. It is recommended that **handouts/brochures are provided for all accommodation providers** with details on 'Experience Munster Vales' in e.g. 2hrs, 4hrs, 6hrs, 2 days.

It is recommended that introduction of a **My Munster Vales card** is considered with discounts and offers on tourism experiences and services in the Munster Vales area, modelled on the My Cumbria card.

It is recommended that a **My Munster Vales app** be developed that brings all the Munster Vales maps, experiences and offers into one place.

Goal 8: To promote online saleable experiences

It is clear from the engagement undertaken to inform this strategy that an emphasis on saleable experiences is needed to enable Munster Vales to demonstrate value for tourism providers, and to encourage more visitors to the area for longer. Recommendations with regards to experience development are discussed under Goal 4 and Goal 5.

It is recommended that the Munster Vales website include a compelling call to action to motivate visitors to stay in the area, with the inclusion of a **range of saleable experiences on the website**. It is recommended that these experiences are developed to appeal to the target audience most likely to visit the Munster Vales, with a **range of individual and bundles experiences on offer**, such as packages focused on Slow Adventure. For example, visitors could pick and choose between a range of accommodation, activities and experiences that suit their interest and budget. It would be important that these are developed in conjunction with communities and businesses and build upon previous work undertaken in this area. To avoid complex payment, bonding, and insurance issues, it is recommended that **bookings can be made via click through from the Munster Vales website**, with payment made to each individual element. This provides an additional benefit in that businesses see traffic coming to them from the Munster Vales website, and Munster Vales learn what visitors and consumers are seeking in the destination.

It is recommended that Munster Vales build upon the work completed in the Munster Vales marketing Plan, in conjunction with Fáilte Ireland, to develop a **range of appealing itineraries**, that align with themes of Wild Atlantic Way and Ireland's Ancient East regional brands, enabling such itineraries to be promoted on the relevant brand websites. A visitor should be able to book a trip which involves hiking, biking, and/or kayaking for example along with accommodation and transport in a one-stop shop. This bundling could create additional revenue for each of these types of businesses as well as creating an 'adventure package'. The Ballyhoura cycle trails offer a premier adventure tourism product in the area. There is an opportunity to package the cycle trails experience with accommodation in the area and to promote this through the Munster Vales website.

Alternatively, key businesses such as accommodation providers could be encouraged to develop on-site experiences or to work with other businesses. As indicated above i**t is recommended that Munster Vales initially target 10-15 key businesses in the area, identify experience gaps, and work to help them develop compelling visitor experiences**.

Working with businesses to develop distinct Munster Vales experiences and promoting these on the Munster Vales website as well as other means, will enable the value of Munster Vales to be demonstrated to tourism businesses as discussed under Goal 2.

7.3 ACTION PLAN

Strategic Priority 1: Stakeholder and Community Engagement

	Action	Lead		Partners	Timeframe	Cost/Funding	KPI
Goal 1: To facilitate community and business engagement							
01.01	**Covid-19 Response** Support existing Munster Vales tourism businesses during the current Covid-19 crisis.	Munster Vales		Fáilte Ireland Cork, Limerick, Tipperary and Waterford City and County Councils	2020-2021	0	Munster Vales tourism providers provided with information on supports available to protect their businesses
01.02	**Munster Vales Board** Review Munster Vales Board composition with objective of including more industry representation. Consider separate focus groups as required e.g. community, experience development, advocacy	Munster Vales		-	2021	0	More trade representation on Munster Vales Board Separate focus groups established as projects receive funding and go to delivery phase
01.03	**Engagement** Community Engagement Pilot Programme focussing on mentoring around use of Munster Vales brand and visitor welcome	Munster Vales		Local communities	2020-2022	€1,000	Community Engagement Pilot Programme introduced
	Review network meetings approach e.g. attraction of high-profile speakers, and review with post meeting assessment sheets	Munster Vales		Tourism providers	2020-2024	€1,000	Increased satisfaction with network meetings
	Consider Munster Vales Tourism Conference and Munster Vales Awards to raise profile of area and businesses	Munster Vales		Tourism providers	2021-2024	-	Annual Munster Vales Conference and Awards feasibility investigated, and recommendation made.
	Review Munster Vales boundary between Tallow and Dungarvan with a view to incorporating the Blackwater Valley	Munster Vales			2021	0	Munster Vales boundary reviewed
	Undertake familiarisation trips for tourism industry within Munster Vales	Munster Vales		Tourism providers	2020-2021	€1,000	Programme of fam trips for industry within Munster Vales introduced
01.04	**Capacity Building** Undertake training needs assessment, including digital audit, of Munster Vales tourism businesses in conjunction with training agencies and ensure courses delivered match needs	Munster Vales		LEO's, ETB's, Third party provider	2021	€5,000	Training needs assessment completed
	Build on existing online social media/website training courses	Munster Vales		LEO's, ETB's	2021	-	Build on existing online social media and website course
	Work with Fáilte Ireland on a programme of Munster Vales Sales and Experience Workshops (see 02.01)	Munster Vales		Fáilte Ireland	2021-2022	-	20 businesses participating in Fáilte Irelands Sales and Experience Workshops
	Advocate for high quality rural broadband roll out	Munster Vales			2021	-	High quality rural broadband available in the Munster Vales area, working with regional broadband officers

	Action	Lead		Partners	Timeframe	Cost/Funding	KPI
	Goal 2: To increase demonstrable socio-economic benefits from tourism						
01.05	**Demonstrating Value** Commission bi-annual survey of businesses and visitors in the Munster Vales to gauge economic and social impact of Munster Vales activities	Munster Vales		Third party service provider	2021, 2023	€5,000 for survey	Bi-annual survey of businesses and visitors commissioned
	Include detail on value of media coverage and of saleable experiences available through the Munster Vales website in quarterly newsletter to network/members (see 01.05)	Munster Vales			2020-2024	-	Value of Munster Vales communicated to network/members in newsletter
	Negotiate preferential rates for members for products and services relevant for their businesses and publicise these in quarterly newsletter to network/members (see 01.05)	Munster Vales			2021-2024	-	Preferential rates secured for members with service providers
	Goal 3: To ensure adequate long-term resourcing of Munster Vales						
01.06	**Resourcing** Introduce membership model for tourism businesses in Munster Vales. Begin with introductory fee and progressively grow revenue from membership as a proportion of overall revenue as part of a collaborative funding roadmap. Due to impact of Covid-19 a medium to long term approach is required.	Munster Vales		Tourism providers	2021-2024+	-	Munster Vales membership fee progressively introduced
	Seek to expand internal staff resources over the course of the strategy to include marketing officer, administrative support by 2022 and a development officer by 2024.	Munster Vales			2020-2024	-	Increase in staff resources for Munster Vales

Strategic Priority 2: Visitor Experience Development of new and existing tourism experiences

	Action	Lead		Partners	Timeframe	Cost/Funding	KPI
	Goal 4: To create compelling visitor experiences						
02.01	**Munster Vales Experience Tour** Phase 1: Target 10-15 key businesses with an emphasis on inter-county linkages within Munster Vales as a phase 1, identify experience gaps, work to help them develop compelling visitor experiences, to be promoted on the Munster Vales website (see 03.02)	Munster Vales		Fáilte Ireland/ Tourism providers	2021	€7,500	Minimum of 10 Munster Vales experiences developed
	Phase 2: Target 10-20 further businesses with the objective of broadening the experience offer over time	Munster Vales		Tourism providers/ Fáilte Ireland	2021-2022	€10,000	Total of 20 Munster Vales experiences developed and promoted
	Link experiences together as a Munster Vales Experience Tour, as well as a menu of Munster Vales itineraries to be promoted online	Munster Vales		Munster Vales	2021-2022	€5,000 for promotional materials - LEADER	Munster Vales Experience Route developed

	Action	Lead		Partners	Timeframe	Cost/Funding	KPI
	Goal 4: To create compelling visitor experiences						
02.02	**Munster Vales Challenge** Develop and promote a Munster Vales Challenge – a mountain-based adventure race	Adventure sector tourism providers Munster Vales (promotion and fund raising)		National Trails Office/ Mountaineering Ireland Adventure tourism provides Fáilte Ireland	2021-2022	€30,000 for promotion – Fáilte Ireland Development cost required	Munster Vales Challenge event held led by private sector operator
02.03	**Munster Vales Trails** Create and promote a: · Munster Vales Food and Craft Trail linking artisan food and craft producers · Munster Vales Gardens Trail linking the garden offer · Munster Vales Heritage Route as a scenic drive that encompasses the best scenery and heritage of the area	Munster Vales		Tourism providers Fáilte Ireland	2021-2022	€10,000 for promotional materials LEADER, Town and Village Development Fund	Munster Vales Trails developed in the form of print and online information and maps (Munster Vales Food and Craft Trail, Munster Vales Gardens Trail, Munster Vales Heritage Trail)
	Goal 5: To consider initiatives to unite the destination and to attract more visitors						
02.04	**Walking Initiatives** Examine the feasibility of a Munster Vales Way walking route from Carrick-on-Suir to Kilmallock via the Knockmealdowns and Galtees Mountains using existing walking routes as a first phase. Explore opportunities to progressively increase the proportion of the route that is off-road (particularly between Kilbeheny and Moorabbey]	Munster Vales		National Trails Office	2021-2022	ORIS	Munster Vales Way walking route established and promoted
	Produce a Munster Vales Walking, Cycling and Canoe/Kayak Trails Map in print and digital format	Munster Vales		Service provider	2021	LEADER	Munster Vales Walking Trails Map produced and available in print and digital format
	Produce a Munster Vales Walking, Cycling and Canoe/kayak Trails app	Munster Vales		Service provider	2021	LEADER	Munster Vales Walking, Cycling and canoe/kayak Trails app developed
	Explore demand for and opportunities to provide public transport linkages between key walking trail heads and accommodation hubs e.g. using exiting Local Link bus services.	Munster Vales		Local Link Tipperary, Waterford, Cork, Limerick	2021-2022	LEADER	Peak period trail head bus service if demand exists

Action	Lead		Partners	Timeframe	Cost/Funding	KPI
Goal 5: To consider initiatives to unite the destination and to attract more visitors						
02.05						
Cycling Initiatives Commission feasibility into extension of Waterford Greenway to Carrick-on-Suir/Clonmel (initially as a walking route with a view to extending to Greenway) connecting to Suir Blueway Tipperary, thus connecting Munster Vales to South East Greenway network	Waterford City and County Council/ Tipperary County Council		Munster Vales	2021-2023	ORIS	Waterford Greenway extended to Carrick-on-Suir
Commission feasibility study into Munster Vales Greenway concept using land alongside existing and along former rail lines running Clonmel-Cahir-Limerick Junction-Charleville-Mallow-Fermoy-Lismore-Dungarvan	Munster Vales		Iarnrod Eireann Local landowners National Trails Office Southern Regional Assembly Fáilte Ireland	2021	Greenway Fund LEADER Fáilte Ireland	Feasibility study commissioned into Munster Vales Greenway
02.06 **Angling Initiatives** Provide option to obtain Munster Vales day angling licence through Munster Vales website	Munster Vales		Inland Fisheries Ireland	2021-2022	0	Option available to purchase angling day licences through link on Munster Vales website
02.07 **Equestrian** Consider development of an equestrian trail in the Knockmealdown Mountains	Munster Vales		Tipperary County Council and Waterford City and County Council Knockmealdown Active Group	2022-2024	0	Feasibility assessment of a Knockmealdown Horse Trail undertaken
02.08 **Canoe & Kayak** Consider opportunities to further enhance the canoe and kayak infrastructure along the River Suir, such as an activity centre	Munster Vales		Tourism Providers	2022-2023	0	Canoe and kayak infrastructure opportunities reviewed
02.09 **Munster Vales Green Corridor** Consider the development of a Munster Vales Green Corridor that runs along and between each mountain range	Munster Vales		Coillte Landowners	2021-2024	-	Munster Vales Green Corridor Feasibility Study commissioned

Strategic Priority 3: Visitor Awareness, Motivation and Engagement

	Action	Lead		Partners	Timeframe	Cost/Funding	KPI
	Goal 6: To raise awareness of Munster Vales as an outdoor activity destination						
03.01	**Marketing Delivery** Prepare 3-year marketing programme focussing on outdoor and distinctive local experiences	Munster Vales		(Fáilte Ireland (IAE and WAW teams), Tipperary Tourism, Visit Waterford, Visit Cork, Limerick.ie.	2020-2023	-	3-year marketing programme prepared
	Consider a new tagline for Munster Vales e.g. replacing 'Munster Vales - An authentic slice of rural Ireland' with 'Munster Vales - Find Your Space'	Munster Vales			2020	0	Tagline reviewed
	Goal 7: To Make Munster Vales visible						
03.02	**Munster Vales Hubs** Phase 2: Roll out digital hubs/screens to key visitor touchpoints in gateways to the Munster Vales e.g. key accommodation and transport (bus/rail) locations, in Carrick-on-Suir, Clonmel, Cahir, Cashel, Tipperary Town, Charleville, Mallow, Fermoy, Mitchelstown Dungarvan.	Munster Vales		Hotels Iarnrod Eireann	2021	€30,000 Town and Village Renewal Scheme Funding	Digital screens purchased and distributed
	Phase 1: Investigate establishment of Munster Vales Hubs in key towns on a pilot basis – a physical gateway to the Munster Vales enabling promotion of the offer and visitor engagement. Consider training Munster Vales Ambassadors in each hub.	Munster Vales			2022-2023	€10,000 Town and Village Renewal Scheme Funding	Munster Vales Hubs established
03.03	**Digital and Print Media** Commission and distribute an enhanced Munster Vales map in digital and print media with an interactive map available on the Munster Vales website	Munster Vales		Service provider	2021	€15,000	Munster Vales map available
	Develop handouts/brochures for accommodation providers –Experience Munster Vales in 2hrs, 4hrs, 6hrs, 2 days in collaboration with tourism providers	Munster Vales		Service provider	2021-2022	€5,000	Experience Munster Vales handouts available
	Introduce a 'My Munster Vales' card with discounts and offers	Munster Vales		Service provider Tourism Providers	2021	€2,000	My Munster Vales card introduced
	Munster Vales App that incorporates interactive map, Experience Munster Vales content, My Munster Vales offers, as well as: · Munster Vales Experience packages and offers, as outlined in action 02.01 and 03.04 · Munster Vales trails (Munster Vales Food and Craft Trail, Munster Vales Gardens Trail, Munster Vales Heritage Trail) as outline under action 02.03 · Activity trails and routes (walking, cycling, canoe/kayak) as outlined under action 02.04 and 02.06	Munster Vales		Service provider Tourism Providers	2022	€5,000	My Munster Vales app introduced with detail on experiences, trails, routes and packages
	Goal 8: To promote online saleable experiences						
03.04	**Online booking of tailored packages/options** Provide range of saleable experiences on the Munster Vales website e.g. bundles of accommodation, activities and experiences with payment made by link to each service provider	Munster Vales		Fáilte Ireland Tourism providers	2021-2024	€10,000	Range of saleable experiences available on the Munster Vales website
	Develop range of experience itineraries, aligned with Munster Vales vision, and regional brand themes	Munster Vales		Fáilte Ireland Tourism providers	2021-2024	-	Range of Munster Vales experience itineraries available on the Munster Vales, Discover Ireland, Ireland's Ancient East and Wild Atlantic Way websites

APPENDIX 1 RELEVANT POLICY OVERVIEW

A1.1 National Tourism Policy

The Government's *People, Place and Policy, Growing Tourism to 2025* outlines multiple key strategies and policies, including placing tourism as a core component of its economic strategy and reiterates the market segments of greatest significance to Ireland, namely the Great Escapers, the Culturally Curious and the Social Energisers[1]. A key objective of this strategy was to set up a Tourism Leadership Group to oversee the formulation of a Tourism Action Plan. Most recently published in December 2018, the *Tourism Action Plan 2019-2021* aims to achieve sustainable growth in the tourism sector. The action plan comprises of twenty-seven actions which focus on important issues, including marketing Ireland as a visitor destination, enhancing the experience of visitors, supporting local communities in tourism and research in the Irish tourism sector.

The **National Planning Framework** sets out national policy objectives aimed at realising the potential of tourism to sustain communities, create employment and deliver social benefits for Ireland and in particular rural Ireland, including to "facilitate tourism development"; and promotes collaboration between tourism agencies and Tourism Ireland to realise this potential. **Realising our Rural Potential – Action Plan for Rural Development** recognises tourism as a key driver of rural economic development and seeks to maximise the tourism and recreation potential of rural Ireland. Fifty-one tourism and recreation related actions focused on increasing tourist numbers to rural Ireland, supporting sustainable jobs through targeted rural tourism initiatives, developing and advancing rural activity tourism and

developing and promoting natural and built heritage assets.

In a regional context, the Southern Regional Assembly's **Regional Spatial and Economic Strategy** realises the significance of the tourism sector for the Southern Region in terms of visits, accommodation and employment and seeks to promote its existing natural and man-made tourism resources and encourage and facilitate the development of further resources in order to achieve its tourism potential. The strategy contains a range of policies with regards to tourism and recreation.[2] Munster Vales is specifically referenced with the strategy stating:

"The Region hosts the three main tourism areas developed by Fáilte Ireland: The Wild Atlantic Way, Ireland's Hidden Heartlands, and Ireland's Ancient East as well as the Munster Vales brand, which is developed jointly by four local authorities. These provide a framework for local areas to develop corresponding tourism propositions".[3]

Fáilte Ireland's Strategy – *Tourism Development and Innovation: A Strategy for Investment 2016-2022* sets out a number of objectives aimed at increasing the attractiveness of Ireland for overseas visitors, including to facilitate communities to play an increased role in advancing tourism in their areas and to acknowledge, value and enhance the natural environment of Ireland as the foundation of Irish tourism. To further support innovation in the tourism sector to increase current competitiveness in the market, the strategy focuses on priority areas. These include ensuring the contribution of tourism to economic growth and regional development is fully acknowledged and understood and building the capacity of the tourism sector to compete more successfully internationally and to become more self-sustaining. The Irish Tourism Industry Confederation's *Tourism: An Industry Strategy for*

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[1] Previously detailed in Fáilte Ireland's *Growing International Sales: Global Segmentation Toolkit*, **"Great Escapers"** tend to be younger, specifically interested in rural holidays and are on holiday to take time out, and experience nature at close range, **"Culturally Curious"** tend to be in the over 45 age group taking a holiday with their partner and are out to broaden their minds and expand their experience by exploring new landscapes, history and culture, while **"Social Energisers"** tend to be younger visitors who like to

holiday in groups or as couples and friends or colleagues looking for an exciting trip to a new and vibrant destination.

[2] Examples include RPO53 on Tourism, page 114 and RPO174 (page 187) "Greenways in the region shall be linked up to a network to improve connectivity within the region for walking routes and commuter cyclists in addition to recreational amenity functions.

[3] Regional Spatial Economic Strategy for the Southern Region, 2020, page 113, our emphasis

Growth to 2025 similarly seeks to increase tourism's employment, exchequer benefits and export earnings. To achieve this goal, the strategy outlines multiple recommendations under ten key pillars which revolve around enhancing competitiveness, improving accessibility, increasing capacity in terms of accommodation and visitor attractions, delivering an enhanced spread of regional and seasonal tourism and managing the challenge posed by Brexit.

In 2015 Fáilte Ireland launched the **Ireland's Ancient East** brand proposition with a brand promise of *'Come to Ireland's Ancient East, and you'll find: 5,000 years of history, in lush green landscapes, with stories told by the best storytellers in the world.'* Strong promotion overseas has included a ground-breaking story telling website with a range of digital assets, social media channels, as well as an ad campaign, signage and capital funding programme. The focus for Ireland's Ancient East is in the development of a layer of stories over history and landscapes that will motivate visitors to visit this part of the world. Nine signature stories or themes for the brand include Ancient Ireland, Castles and Conquests, High Kings and Heroes, A Tale of Two Worlds, Maritime Gateway, Ireland's Mystical Waterway, Sacred Ireland, The Sport of Kings, and Vikings.

Fáilte Ireland have developed a 'Castle and Conquests' Visitor Experience Development Plan within the Ireland's Ancient East area, which includes Cashel, Clonmel and Fethard, with the objective of creating motivating and appealing visitor experiences. The castle experience will be brought to life by guided tours in castles, on castle grounds, in local towns and overnight stays; evening experiences - banqueting and dance as well as musical entertainment; costumed interpretation and re-enactments; integrated visitor experiences by curating links and sharing stories between visitor sites.

The Wild Atlantic Way, launched in 2014, is Ireland's first long-distance touring route, stretching along the Atlantic coast from Donegal to West Cork. The overall aim of the project is to develop a route that will achieve greater visibility for the west coast of Ireland in overseas tourist markets. The Wild Atlantic Way includes the following themes: Life Shaped by the Atlantic (traditional

culture), Where Land Meets Sea (close encounters with the elements), Connectedness – the feeling of connecting to the people and the landscape).

While two-thirds of Munster Vales is in Ireland's Ancient East, the western third is in the Wild Atlantic Way region, as shown in figure 15 and 16.

A1.2 County Development Plans and Tourism Strategies

This section reviews specific policies and objectives regarding Munster Vales discussed within the four county development plans and their respective tourism strategies that give structure and direction to tourism growth of the region.

Figure 15 Ireland's Regional Experience Brands (Source Fáilte Ireland)

Figure 16 Munster Vales and Regional Brands

County Limerick has recently published its Tourism Development Strategy: Action Plan 2019-23. The strategy focuses on the implementation of a series of actions formed around <u>four key themes</u>- which looks at developing activities associated with waterways (Into the Blue), activities (Energy Unleashed), Heritage (Vibrant History) arts and culture (Alive and Kicking). It is envisaged that by 2023 that the total number of visitors to Limerick City and County will reach 1.1million and generate €360.6million in revenue and create in the region of 1,500 new jobs in the sector. The vision for Limerick is that it will become *internationally recognized as a world-class location to visit*. **Munster Vales is projected as an immediate venture under the 'Energy Unleashed' theme for the Ballyhoura region, that seeks to explore additional trekking routes connecting Ballyhoura with other mountain trails, along with a long-term view to connect with the Great Southern Greenway Limerick (Action Area No.1.4).** Ballyhoura region has also been identified for developing water-based activities and itineraries. Under 'Vibrant History' it is envisaged to increase collaboration between four heritage clusters of Limerick that includes Ballyhoura, Lough Gur within the Munster Vales region. The main tourism policies that are of significance to Munster Vales under Limerick County Development Plan 2010-14 (extended to 2018) are:

- The County promotes **niche tourism and recreation activities** such as eco-tourism and outdoor adventure sport tourism
- It is the objective of the Council to ensure that tourism facilities are not located or designed where they would be significantly detrimental to **environmentally sensitive areas**. It is also desired that tourism facilities and amenities follow sustainable development practices.

- The Council generally require new tourism development to be located within **existing settlements** where they can be best supported by existing services and protect heritage features from unwarranted encroachment.
- Developments in Ballyhoura and Galtee Uplands are protected under **high-value landscape** area objectives EH O8 and EH 09 respectively.

County Cork has prepared a collective strategy for tourism in Cork city and county in 2015 titled 'Growing Tourism in Cork: a collective strategy'. The strategy recognizes Cork's unique position, among two key experience brands developed by Fáilte Irelands- Irelands Ancient East and the Wild Atlantic Way, as a huge opportunity for the county. The key focus for the tourism strategy is to make Cork a **'famous for'** and **'must visit'** destination for domestic and international visitors, by developing responsible tourism opportunities and thereby create revenue to the local economy. The strategy seeks to include <u>three important elements</u>: i) ensure that the visitor is at the centre of all actions, ii) giving a reason to visit Cork via the creation of a visitor led tourism proposition and iii) developing a joined tourism experience with a single point of view and clear priorities. Cork is recognized as Ireland's Maritime Paradise and it is envisaged that in the period of 2015-20 the visitor numbers will see an increase of 21.3% and followed by an increase in revenue spend by 27% spend per capita for the same period. Main tourism policies concerning Munster Vales within the County Development plan are:

- The Core strategy recognizes the need to **encourage the diversification of the rural economy** by promoting a stronger tourism and leisure economy.
- It is the County's objective to **promote the development of walking and cycling routes** throughout the County
- County seeks to develop the tourism sector and encourages the development of holiday accommodation **within established settlement boundaries**.

- Munster Vales region is recognized as **high-value landscape** Character type 5- *Fertile plain with Moorland Ridge.*

County Tipperary has prepared a joint Strategic Tourism, Marketing, Experience and Destination Development Plan in 2016 for the whole County. The tourism plan is founded on <u>5 pillars</u>- Destination development, Product development, Industry development, Marketing and Measurement. The vision for the county is - *as an undiscovered heartland of Ireland* to become *an authentic, yet-to-be-discovered experience* that is rooted *in a land even more ancient than the historic buildings that remain*. As the county lacks in a central focus 'hub' that might act as a magnet for tourism, it focuses on the development of zones within the county that uses major towns as gateways and facilitators. The tourism Plan identifies four zones around which tourism assets are naturally clustered, which can be used to prioritise development and to bundle experiences. Munster Vales lies across identified zones C & D in the south. It is targeted that within the five-year period the county will move into to the top three counties based on performances, with an increase in earnings in the order of 75% to reach over €100million. Policies that concern tourism development in Munster Vales within the South Tipperary County Development Plan, 2017 are:

- Within its Core Strategy, the County aims to **enhance and revitalise town centres** to become a vibrant and viable place to live, work and visit, while also, safeguarding showcasing its unique assets.
- Specific policies seek to **promote sustainable tourism and eco-tourism** in the county. It is encouraged to develop tourism related facilities and accommodation within existing settlements
- Specific objective SO5-15 support, encourage and **promote sports tourism** within the county

- **Visually sensitive upland areas** and important tourist destinations such as Galtee mountains, Slievenamon and Knockmealdown mountains are identified as Primary Amenity Areas which is protected under Policy LH2 from developments that can cause adverse material impact.

Waterford City and County published its Tourism Statement of Strategies and work plan in 2017. The vision for the tourism strategy is to make Waterford *a year-round economically successful tourism destination*, *with lasting benefits that will support local communities* and *realise additional economic growth, jobs and prosperity*. Developing activity tourism potential of the Comeragh Mountains and Munster Vales is targeted under Regional Collaboration and Bespoke Initiatives for 2017-20 period. Infrastructural projects have also been identified for development across the Munster Vales region including St. Declan's Way in Waterford, through funding under Rural Economic Development Zone. Waterford County Development Plan 2011-17 includes the following tourism policies:

- The development plan aims to build on the strengths of the County giving priority to **sustainably developing the tourism product**
- County seeks to **facilitate the expansion of tourism activities** in appropriate locations, within existing settlements where they can be supported and development of appropriately located Integral Rural Tourism and Recreational Complexes that add to the amenity value and tourism potential of the County
- Policy ECD22 looks at **facilitating quality walking and cycling routes** in Waterford
- Regarding **Comeragh Mountains** Objective ECD7 seeks to facilitate activities that do not cause landscape or environmental degradation and avoid adverse effects on the designated sites in the area.

APPENDIX 2 CONSULTEES

Stakeholder Strategic Conversations

- Justine Carey (Programme Manager-Ireland's Ancient East; Tipperary) – Fáilte Ireland
- Mary Houlihan (Programme Manager-Ireland's Ancient East; Cork & Waterford) – Fáilte Ireland
- Deirdre Cole (Regional Development Officer -Ireland's Ancient East; Cork) – Fáilte Ireland
- Ivona Carr (Regional Development Officer - Ireland's Ancient East; Waterford) – Fáilte Ireland
- Shauna Cunningham (Regional Development Officer Wild Atlantic Way; Limerick) – Fáilte Ireland
- Mary O'Brien - Coillte
- Frank Shalvey - Office of Public Works)
- Don Cunningham - Iarnrod Eireann
- Rose Carroll (Tourism Development Officer) – Cork County Council (Munster Vales Board Member)
- Majella O'Brien (Tourism Development Officer) – Limerick County Council (Munster Vales Board Member)
- Marie Phelan (Tourism Development Officer) – Tipperary County Council (Munster Vales Board Member)
- John Egan (Rural Recreation Officer) – Tipperary County Council
- Claire Loughnane (Tourism Development Officer) – Waterford County Council
- Johnny Brunnock (Trails Officer)
- Mark Britton (Trails Development) – Ballyhoura Heritage and Environment
- Amanda Slattery (Development Manager) – Ballyhoura Development CLG

- Pat Slattery – Chairperson of Munster Vales Board
- Isabel Cambie – South Tipperary Development Company (Munster Vales Board Member)
- Helen Morrissey – Aherlow Fáilte (Munster Vales Board Member)
- Ger Walsh – Waterford City and County Council (Munster Vales Board Member)
- Tony Musiol (Munster Vales Board Member)
- Billy Duggan – Waterford City and County Council (Munster Vales Board Member)
- Kate Harrold – Ballyhoura Community Representative/ Manager Lough Gur (Munster Vales Board Member)
- Christy Roche Nagles Community Representative (Munster Vales Board Member)
- Declan Mulhearn – Comeraghs Community representative (Munster Vales Board Member)
- Elizabeth Nallen (Manager) – Hotel Minella
- Aising Sales (Manager) – The Donkey Sanctuary
- Monica Gilmore (Sales Manager) - Charleville Park Hotel & Leisure Club
- Garvin Cummins – The Greenway Man
- Maurice Gilbert - Ballyhoura Apple Farm & Artisan Food par
- John English - Mitchelstown Cave
- Barbara Grubb - Dromana House and Gardens
- Ciara Flanagan - Comhaltas CeoltóirÍ Éireann
- Chris O'Callaghan – Trailriders Ballyhoura
- Torri McMorran – Fethard Horse Country Experience
- Mairead Winters – Acting Tourism Marketing Officer Munster Vales

APPENDIX 3 ONLINE SURVEY SUMMARY

Some key points from the survey are discussed under each question heading below. Question 1 asks for the name of the business responding. 55 of the 69 respondents answered this question and are listed in Appendix 2.

Q2 What is your product offering within Munster Vales?

Almost 20% of those responding to the survey represented accommodation providers. The next five categories were heritage (18%), outdoor activity providers (16.5%), food and drink production/food tourism experience (12%), visitor attraction (10.5%) and arts & culture (7.5%).

Q3: How many visitors did you attract in 2018 and 2019?

Key points that can be drawn from analysis include:

- Most respondents do not represent large volume businesses.
- Accommodation businesses offer other experiences on-site.
- Just based on the relatively small sample of respondents there are many small experiential businesses based in Munster Vales, ranging from outdoor activities in the mountains, lowlands and rivers, to food and drink-based experiences, to those based on cultural heritage. These are identified in green. While a broad-brush approach, it is indicative of the wide range of experiential tourism on offer, with a focus on animating the natural environment and cultural heritage of Munster Vales.
- The relatively low numbers provided for many of the businesses could indicate that there is considerable potential for development and growth.

Q4: Please indicate how familiar you are with the initiatives undertaken as part of the Munster Vales branding. [rating from 1-3, 1 being not familiar, 2 being familiar, 3 being very familiar]

The data shows that respondents were mostly familiar with the destination marketing and promotion activities of Munster Vales, and to a lesser degree training workshops, rather than any activities to enhance new attractions.

Q5: In what way, if any, have you become actively involved in promoting Munster Vales?

The results show that just over a third of respondents have had no active involvement with Munster Vales. Those who have were involved have interacted primarily with social media/digital marketing (45.5%), followed by brand/logo & website/brochure (32%), attending a trade show (25%) and press trip (20%). The numbers indicate that respondents were involved with more than one element.

Q6: Please provide the number of staff employed in both 2018 and 2019

Analysis shows that of those who took the survey, the accommodation providers are the biggest employers. Youth Service WSTCYS and Ballyhass Adventure Group are also significant employers, with the latter having a higher seasonal focus.

Q7: Do you feel that Munster Vales has contributed directly to your business employing extra staff since its launch in October 2017?

Almost one in ten respondents did think that Munster Vales had directly contributed to an increase in the number of staff employed since 2017. However, most respondents (50.8%) did not think Munster Vales had done so.

Q8: Do you feel that Munster Vales has contributed to an increase in visitor numbers to your business since its launch in October 2017?

Over 30% of respondents (30.2%) thought that Munster Vales had contributed to an increase in visitor numbers to their business since 2017. When disregarding those that thought the question not applicable to them, the proportion rises to almost half or 47.5%.

Q9: How did the volume of your overall business in 2019 compare with 2018?

Almost half of those responding thought that business was up on 2018 (45.9%). 16.4% thought that business was the same as 2018, and 11.5% thought business was down on 2018.

Q10: Is your business open all year round?

Most businesses (60% of the respondents, 68.5% of those that thought the question applicable to them) were open all year round.

Q11: In 2019, which of the following applied to your business?

Most business (47%) thought they were open for the same amount of time in 2019 as 2018. Some (14.5%) thought they were open for longer, and 8% thought they were open for less.

Q12: For your business, what would you estimate is the percentage split between income generated from overseas visitors and income generated from domestic visitors?

When respondents are grouped together two discernible patterns can be found. While not the case for all, it can be seen that

- outdoor activities attract more domestic audiences,
- accommodation providers tend to attract a more balanced market, although Clonmel Park Hotel stands out as a having a significantly domestic audience.
- Most visitor attractions have a primary domestic audience
- Heritage and food/drink experiences attract a comparatively higher proportion of international visitors,
- The remaining few that responded to this question attract a primarily domestic audience.

This broad-brush analysis, which would be more informed if all respondents answered the question, and with a wider sample of tourism businesses in the Munster Vales area participating, indicated that the domestic audience is important to Munster Vales businesses. It further shows that accommodation providers provide a route to encourage increased numbers of international visitors to tourism providers such as outdoor activities, heritage, food and drink experiences.

Q13: Please rate the importance of following potential objectives for Munster Vales over the next 3-5 years.

Analysis of the data shows that respondents believe the order of priority for objectives for Munster Vales over the next 3-5 years are:

1. **Collaborating with communities** in enhancing Munster Vales destination (4.3)
2. **Develop/improve new tourism product development** e.g. outdoor recreation, signage (4.26)
3. **Provide more opportunities for visitors to experience the destination** e.g. food tourism or guided experiences (4.22)
4. **Promote Munster Vales as a cohesive destination** e.g. media visits, product bundling, social media, attending consumer shows, brochures, advertising in print media and radio, developing website (4.16)
5. **Increase the adoption of sustainable business practices** in tourism industry (3.98)
6. **Increase visitor numbers during off-peak** (3.85)
7. **Develop skills, knowledge** to build local tourism management capacity (3.69)
8. **Increase skilled workforce** in Munster Vales' tourism industry (3.37)

This indicates that respondents believe the most important activities for Munster Vale to be collaboration, product and experience development, and marketing and promotion.

Q14: How do you believe Munster Vales can make its business model more successful?

While many of the 44 respondents that answered this question thought that Munster Vales should carry on doing more of the same, there were some interesting suggestions. These included:

- *You need to set up **adventure events**. From family friendly to professional events.*
- *Create a **theme to each season** to refocus all stakeholders similar to things like the Fáilte Ireland Gathering*
- ***Reunion breaks** will be the new buzz words. Munster Vales primed to be the next under-visited destination*
- ***Creating and deliver one very specific tourism product that would make the destination known nationally & internationally and develop it to a high level,** instead of focusing on numerous smaller goals. Connect four mountain ranges experience and create a go-to destination for the specific target audience.*
- *There would be good potential in development of a **food trail**. As there is a rich range of artisan food producers in the region.*
- *Try and **encourage visitors to stay within the area overnight** and so visit more places and sites that are off the beaten track.*

- *Have **different packages aimed at the different target markets** i.e. Families, older tourists, Active Retirement Group, Entertainment for Business Travellers*
- *Have a **tag line***
- ***Getting business to come together to offer packages to guests in regards all of the offerings from the Munster Vales region.***

Q15: What training provided by Munster Vales has been of most benefit to you?

Of those that did provide an answer highlighted social media training, marketing, networking, tour guiding.

Q16: Are there any particular training courses that you feel would benefit your business and Munster Vales destination?

Of those that answered marketing and social media/websites were the most popular suggestions with 7 each. Other requests included guided tours of targeted areas (fam trips), business development, languages, funding application, and photography. There was a comment that evening courses would suit volunteers better.

Q17: Do you have any suggestions for development of new products or experiences within the Munster Vales area that would bring the mountain ranges together and be of significant scale as to attract a large volume of new visitors to the area?

There were many thought provoking responses to this question. Respondents thought that there should be a focus on **development of saleable experience**s, with comments including:

- *Focus on **high-value small group experiences***
- *Food & drink tourism, more luxury camping/glamping/self-catering facilities, "home hosting" experiences for Intl visitors, greater marketing of small businesses like small shops, cafes, etc. **Creation of "saleable experiences" for these types of small businesses.***
- ***Organise full day activity followed by evening entertainment** so that they will stay several nights in the area and stop the idea of " doing Ireland in a day or 2 "*
- ***Walking package which would include a day/night in each mountain range** which would include a walk, meal experience and an overnight*
- ***Activities, heritage, food are a good blend** which are part of the brand*
- ***Combined promotion of local experiences***
- ***Garden trail***

Also highlighted was the opportunity for **product and experience development with a focus on the mountains**, with respondents' comments including:

- *5 peak family friendly outdoor survival loop. Mix of camping and accommodation, with camp bases set up and either guided or mapped routes. Mix in some of the outdoor activities in each area.*
- *As running has become so popular maybe a women's race up Sliabh na Mban*
- *focus on one product/experience that would connect the mountain ranges and counties together... for example similar to the 'Camino' style of product.*
- *A large-scale mountain themed event. "Music in the Mountains" or Mud Runs are always good.*
- *a dedicated equestrian trail through these mountain ranges*
- *introduction of a substantial strip of native broadleaf sylvopasture on the slopes of these mountains and where possible a lowland strip of similar flora linking the mountain ranges. Hiking trails would be incorporated into the scheme, and stakeholders along the way given help in return for their participation (subsidies, help creating low impact chalets, lodges, campsites, parking etc).*

Others highlighted the **walking and cycling opportunities** on the lowlands/rivers:

- *The Waterford Greenway has transformed tourism in West Waterford, which in the long term should benefit the whole county. The River Suir is the thread that joins the mountain ranges. The Blue way if correctly managed could do the same for the central Munster Vales area with a knock-on effect for the wider region. Also, developing the East Muster Way and linking it with a wider network of trails (e.g. St. Declan's Path).*

NOTES

MUNSTER VALES

Cork County Council Comhairle Contae Chorcaí

Limerick CITY & COUNTY COUNCIL

Oifig Fiontair Áitiúil
Local Enterprise Office

Comhairle Contae Thiobraid Árann
Tipperary County Council

Waterford City & County

WILD ATLANTIC WAY

PURE CORK

ATLANTIC EDGE LIMERICK

Visit Ballyhoura

BALLYHOURA

WATERFORD

TIPPERARY

IRELAND'S ANCIENT EAST