

Lough Derg

Visitor Experience Development Plan

2020 - 2024



Tipperary Local Community Development Committee (LCDC) is the managing body for the European Union Rural Development 2014 -2020 (LEADER) Programme in County Tipperary. This project has been co-funded under the EU Rural Development 2014 -2020 (LEADER) Programme implemented in County Tipperary by North Tipperary Development Company on behalf of the Tipperary LCDC.

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Contents

| | |
|--|-----------|
| The Visitor Experience Development Plan at a Glance | 6 |
| The Story So Far | 8 |
| 01 Introduction | 10 |
| Why a Visitor Experience Development Plan? | 10 |
| Where is it for?..... | 11 |
| Who is it for? | 11 |
| Key local insights | 13 |
| 02 Ambition | 14 |
| 03 Foundations | 16 |
| The place – our assets, our appeal | 16 |
| Getting here and around..... | 21 |
| The enabling policies..... | 22 |
| 04 Market Assessment | 24 |
| Volume and value of tourism | 24 |
| Future prospects – understanding our visitors and what they want | 26 |
| 05 Gearing Up | 32 |
| 06 Experience Development | 34 |
| Killaloe/Ballina Destination Hub..... | 37 |
| Holy Island and Destination Villages | 40 |
| Portumna Destination Hub..... | 43 |
| Nenagh Gateway Town | 46 |
| Building a great Slow Travel Network..... | 49 |
| Marketing and Communications | 52 |
| 07 Measuring Success | 54 |
| Useful Metrics..... | 54 |
| How we will gather the data | 56 |
| 08 Action Plan Overview | 58 |
| APPENDICES | 59 |
| APPENDIX A – A detailed analysis of the domestic Connected Families needs and wants..... | 60 |

The Visitor Experience Development Plan **at a Glance**

The Place and The Opportunity



THE PLACE



Our Assets - the resource for tourism;
Towns and Villages,
Lake waters and
Landscape



Our People and Businesses;
local insights and the
type of tourism we
want



THE OPPORTUNITY



Our likely visitors;

Who they are:

- Connected Families
- Great Escapers
- Culturally Curious
- Footloose Socialisers

What they want:

easily accessible
experiences, active together,
in nature; great local food;
local stories well told

The Enabling Context

ENABLING STRATEGIES;

Ireland's Hidden Heartlands,
Shannon Masterplan, County
Development Plans and County
Tourism Strategies

TRENDS IN TOURISM AND FUTURE PROSPECTS;

Authentic and personalised,
slow travel, activities in nature,
opportunities to learn new skills,
well-being, distinctive towns and
villages

ENABLING INVESTMENTS;

The 2014-2017 Lough Derg
Road Map projects, new
projects underway e.g. Inis
Cealtra (Holy Island), Killaloe/
Ballina Enhancement Plan,
Nenagh Historic Quarter, Beara
Breifne Way



Destination Development

THE PLAN OF ACTION

AREA ACTION 1 Destination Management

Resource the Partnership; Organise the stakeholder group and resource the tourism role at Lough Derg.

Consolidate the Approach; Align with the Tourism Masterplan for the Shannon and Ireland's Hidden Heartlands (IHH).

Coordinate Lake Wide Initiatives; that deliver a high quality visitor experience.

Measure Progress; Measure performance and remain responsive to emerging evidence on visitor behaviour and preferences.

AREA ACTION 2 Destination Innovation

Provide a Great Visitor Welcome; Ensuring a great welcome for visitors across the whole destination.

Enable a Choice of Accommodation; Support the development of a variety of unique accommodation options to meet visitor needs.

Facilitate Slow Travel; Make it easy for our visitors to explore Lough Derg sustainably by developing services along the slow travel network.

Offer Great Food; Enhance the visitor experience with high quality, locally produced food on and around Lough Derg.

AREA ACTION 3 The Visitor Experience

Killaloe/Ballina Destination Hub; A natural playground with fresh perspectives on this iconic Shannon crossing; the perfect base to get active in nature.

Inis Cealtra (Holy Island) and Connected Destination Villages; Explore Inis Cealtra, a 6th century holy island connected across lake waters to a necklace of historic lakeside villages and harbours.

Portumna Destination Hub; Uncover Irish history through a connected network of woodland, water and mountain trails, extending from Portumna's historic core to nearby villages and monastic settlements.

Nenagh Gateway Town; A bustling market town steeped in heritage, with a great reputation for food, compelling stories and a great welcome to the Lough Derg region at Nenagh's Historic Quarter.

AREA ACTION 4 Destination Marketing

Develop a Distinctive Digital presence; Update and maintain a distinctive Lough Derg digital presence.

Ensure Cohesive Communication; Work with national and local bodies to coordinate communication and ensure cohesive messaging.

Partnership; Support marketing actions of tourism businesses.

Be Market Ready; Work together to create and promote market-ready offers, packages and itineraries.

SPREADING THE MESSAGE

Align communications with motivations of the most likely market segments

Action Delivery

Destination Lough Derg & Lough Derg Networks



MONITORING & MEASURING OF IMPACTS

The Story So Far



This Visitor Experience Development Plan continues the integrated approach to destination development forged by the 2014-2017 Lough Derg Road Map. The cross-agency approach to co-ordinated investment in the area has positioned the Lough Derg region to fulfil a key role in the new Ireland's Hidden Heartlands national brand experience.



**Co-ordination
is key!**

¹ All quotations are taken from the Portumna and Killaloe/Ballina Lough Derg Destination workshops undertaken in November 2018



Ballycuggeran

The Lough Derg Marketing Group (LDMG) received the award for best 'Local Authority Innovation' at the Irish Tourism Industry Awards in 2017 for the coordinated approach to destination development across the Lough Derg region. This work has been funded by a stimulus fund from the Dept. of Transport, Tourism and Sport and investment from the agencies forming the LDMG. Work completed to date includes:

- **The Lough Derg canoe trail** with new and upgraded service blocks, improved egress and access points, map boards and storage racks – this project grew into the **Lough Derg Blueway** with broad trade engagement and detailed print/digital visitor information
- **Lakeshore amenity infrastructure**; Connaught Harbour, Castlelough and Ballycuggeran amenity areas, Ballina Lakeside park and Portumna Castle harbour including recreational vehicle spaces
- **Signage Strategy and implementation**
- Lake wide **branding alignment**
- **A Feasibility study and masterplan** for Portroe Lookout Discovery Point and connecting walks
- **A Visitor Management and sustainable tourism development plan** for Holy Island
- Portumna **Eco-tourism Destination Masterplan**
- **An Activity map**, natural and cultural heritage **trails and booklets**
- Floating **angling stands** at Mota Quay
- **Trails development**; Killaloe–Ballycuggeran footpath, Tountinna amenity area, Millennium Cross
- **Floating jetty at Ballina** providing enhanced and disabled access to the lake
- **New website**; www.discoverloughderg.ie and social media profiles on facebook ([discoverloughderg](https://www.facebook.com/discoverloughderg)) and twitter (@discoverlderg)
- Lake-wide trade familiarisation, **training and networking events**
- **Marketing and promotion** in conjunction with Fáilte Ireland, Tourism Ireland and Waterways Ireland
- Imagery and **video** content creation
- **Grant aid** to Lough Derg tourism businesses
- Lough Derg participation in an **EU INTERREG** study
- The **Taste of Lough Derg** initiative with food events
- The establishment of the **Lough Derg Destination Recovery Taskforce** and the implementation of an action plan which will focus on the delivery of the COVID-19 safety charter and related business supports

01 Introduction

Why a Visitor Experience Development Plan?

The Lough Derg region has a wide range and combination of natural assets, talented people, agencies tasked with looking after the place and businesses developing visitor experiences.

It has its own particular and distinctive offer of value and great work is already underway across the region to develop this offer for the enjoyment of local people and for visitors.

The drive to reposition the Shannon Region in the minds of prospective visitors through “Ireland’s Hidden Heartlands” has created an ideal opportunity for Lough Derg to confidently set out its stall as a destination within this new experience brand.

The region has been fully engaged with this initiative and looks forward to reaping the benefits of a strategic alliance with its tourism partners. It is generally recognised, however, that the visitor

experiences on offer in Lough Derg are not widely known domestically or internationally and that the benefits of tourism are concentrated in a few areas.

The purpose of this Visitor Experience Development Plan is therefore to provide;

- a steer for **experience development and investment** based on **geographically distinctive opportunities**,
- insights into the **motivations of our most likely visitors** – what they need and want,
- a framework for curating **clusters of experiences** that will motivate prospective visitors,
- a **collaborative approach to spreading the word** about this great place, and
- ways of **keeping track of progress**

This Strategy sets out the overall approach to Destination Planning for the next five years and a separate accompanying document sets out a detailed Action Plan.



Where is it for?

The core focus of this Visitor Experience Development Plan is Lough Derg itself - the waters, islands, lakeshore and lakeside settlements. The success of the lake region, however, depends on a connected network of visitor experiences across a geography stretching from Limerick in the south to Nenagh and Cloughjordan in the east, as far as Meelick and Banagher to the north and including East Clare and the Slieve Aughty mountains.

The Lower Shannon, incorporating Lough Derg, is one of three "Discovery Zones" in the new Shannon Tourism Masterplan. The Lough Derg region also includes the long distance Beara Breifne Way which is one of Ireland's Hidden Heartlands' "transformational signature products of scale". This strongly positions Lough Derg within a context of emerging national strategies and significant long distance trails and greenways connecting Lough Derg to the whole Shannon region.

Lough Derg is the third largest lake in Ireland and the largest lake in the River Shannon system. It lies within a limestone basin and the surrounding uplands, the Slieve Aughties, the Arra Mountains and Slieve Bearnagh, are composed of much harder rock, mainly sandstones. The diversity of landscapes is a result of the variation in geology, topography, climate and land-use history in and around the lake. The outstanding natural heritage of Lough Derg enhances the visitor experience by providing a range of vistas, sights, sounds and places to explore and opportunities to experience and learn about nature and wildlife.

Lough Derg, and several areas in the surrounding landscape are designated for nature conservation both as Special Areas of Conservation (SACs) and a Special Protection Areas (SPAs), which reflects the huge significance of the natural heritage in this area.



Who is it for?

This Visitor Experience Development Plan shines a light on the work already underway to develop visitor experience, aligns it with the wider ambition for the Shannon region and identifies what needs to be done to meet the needs of current and future visitors.

It sets out the co-ordinated priorities **for the Lough Derg Marketing Group members** in their important roles as enablers of a growing visitor economy in the Lough Derg region

It will support people and businesses working together to **develop visitor experiences in their area.**

How we developed the plan

This plan was developed collaboratively by the members of the Lough Derg Marketing Group and region-wide stakeholders who participated in two workshops in November 2018 in Portumna and Killaloe/Ballina and in follow up meetings and conversations. The output of these workshops was collated into Workshop Outcomes Reports which were issued to all participants and form the basis of strategy development.

The Plan is rooted in the expertise and experience of people already working in the visitor economy in the Lough Derg region, and the strategic priorities of the agencies tasked with looking after the place and planning its future.



Strategic Environmental Assessment

Tipperary County Council, as the competent authority, commissioned this VEDP to support tourism and experience development in Lough Derg. An Environmental Report was prepared by SLR Consulting as part of the Strategic Environmental Assessment of the VEDP in accordance with the requirements of EU and national legislation on the assessment of the effects of certain plans and programmes on the environment.



The purpose of the Environmental Report is to:

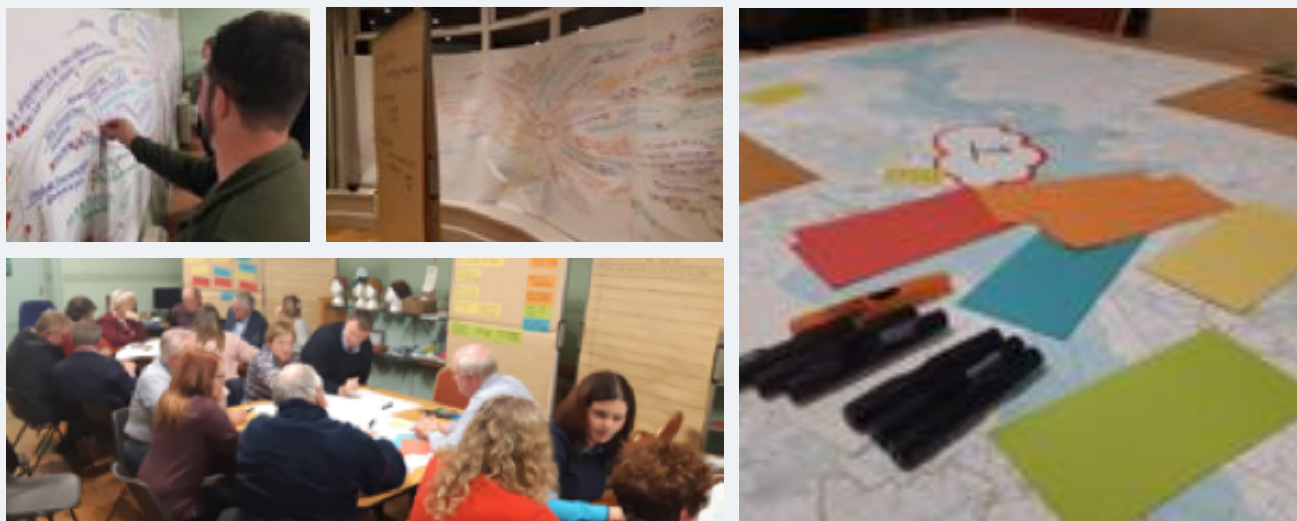
- Inform the development of the draft Lough Derg VEDP;
- Identify, describe and evaluate the likely significant effects of the draft Lough Derg VEDP and its reasonable alternatives;
- Improve the environmental performance of the VEDP; and
- Provide an early opportunity for the statutory authorities and the public to offer views on any aspect of the Environmental Report and accompanying VEDP, through effective consultation.

The Environmental Report complies with the requirements of the Directive 2001/42/EC on the assessment of the effects of certain plans and programmes on the environment (the SEA Directive) as implemented in Ireland through the European Communities (Environmental Assessment of Certain Plans and Programmes) Regulations (S.I. No. 435 of 2004).

The VEDP has been developed having regard to the key features and characteristics of the masterplan area. Key environmental issues were identified as part of the SEA process, documented in the Environmental Report and addressed within the VEDP. Measures to improve the environmental performance of the VEDP have been integrated throughout the document but are also outlined in the environmental management section in Chapter 07 Measuring Success.

This VEDP also emphasises that subsequent tourism proposals must be consistent with the environmental commitments contained in the National Planning Framework and Regional Spatial and Economic Strategies as well as the County Development Plans and Local Area Plans of the relevant local authority.

Project proposals and other proposed plans, referred to in this masterplan will also need to take into account the requirements of the relevant environmental legislation and associated EU Directives such as SEA, EIA, Birds, Habitats, Floods and Water Framework directives, as appropriate. Further information on environmental sensitivities in the plan area which will help inform the need for these assessments is available from the EPA's Environmental Sensitivity Mapping Webtool www.enviromap.ie.



Key local insights

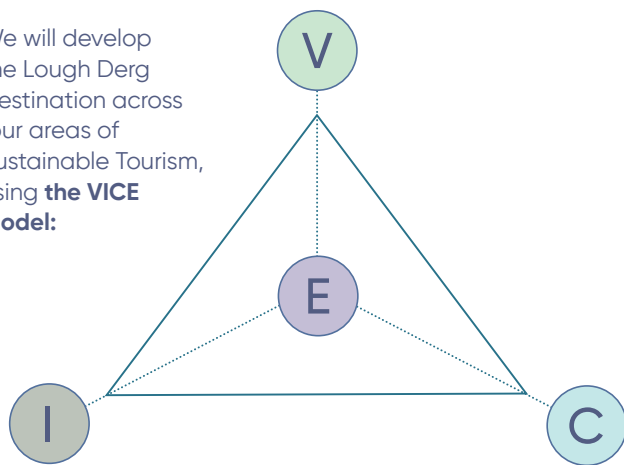
Ideas for developing the destination were discussed at the workshops and in follow on conversations with stakeholders, these are summarised below:

- Take a **hub and spoke** approach – offer visitors a great place to stay with plenty to do nearby – creative curation of clusters of existing experiences can bring quick results
- We need to make the experiences **easy to consume**
- The southern half of the lake is already well on the way to positioning itself as a key regional hub within Ireland's Hidden Heartlands for **high adrenaline activities on and off the water**
- Developing **Portumna as a destination town** would be a game changer – its geography positions it at the junction of the **two strategic spines of the Ireland's Hidden Heartlands** brand experience
- The ongoing work to present **Holy Island** in new ways to visitors can have knock on benefits for the **whole central region of the lake** on both the Clare and Tipperary sides if easy ways for visitors to cross the lake are progressed
- **The environment is the asset**
- **Off-road connections beyond the immediate lake context** are important – south to Limerick and north to Meelick and Clonmacnoise – with potential for developing experiences along the way which reveal the interaction of people and water through history such as the Pilgrimage journey and the harnessing of the river's power at Ardnacrusha
- The comprehensive existing audits of heritage and natural assets provide a **strong basis for curating experiences** for visitors, along trails, and within easily understood geographies
- **Lakeshore forests** in state ownership have a key role to play in deepening visitor experiences in key locations around the lake
- **Digital is everything** and business websites are the shop window for the destination
- **Blueway enterprise activation and support** is crucial
- Pick a few things and **do them well**
- We need to ensure visitors **understand distances** within the destination and the **options for moving around** the intricate land and water geography
- The current use of existing visitor infrastructure is **unbalanced**
- **Rural depopulation** is happening – particularly in the northern and north western areas
- Different parts of the lake are at **varying stages of destination development**
- There is still much **scope for new businesses** to take advantage of the opportunities provided by new infrastructure development

02 Ambition

We will invite our visitors to explore **distinctive historic towns and villages** at the heart of **interconnected land and water trails** making it **easy for all to journey at their own pace on water, on foot and on two wheels** to revitalise at **our lakeshores, our spiritual islands and in our clear lake waters**, taking in the **fresh perspectives from our mountains** and opportunities everywhere to enjoy the **scenery on a plate**.

We will develop the Lough Derg Destination across four areas of Sustainable Tourism, using the **VICE model**:



V Visitor:
Ensuring that Lough Derg is compelling to our target market segments and that it becomes a distinctive and high quality visitor experience based around the principles of slow travel

I Industry:
Ensuring that the Destination Lough Derg Plan delivers balanced and sustainable revenue and jobs growth with greater geographic and seasonal spread

C Community:
Ensuring that the Destination Lough Derg Plan delivers benefits to local communities and contributes to a better place to live for everyone

E Environment:
Ensuring that the implementation of this Destination Lough Derg Strategy facilitates the protection and enhancement of the environment of Lough Derg and its environs as the fundamental asset that is the basis of tourism in the region, in association with other key stakeholders

Our key commercial targets²

↑ INCREASE
Revenue from **overseas visitors** into the destination by

 **3%**
YEAR ON YEAR³

↑ INCREASE
Domestic bed nights to the destination by

 **3%**
YEAR ON YEAR⁴

↑ INCREASE
Occupancy levels in the main hotels and accommodation providers particularly in the shoulder season⁵



↑ INCREASE
Visitor numbers to the **main attractions** and **activity providers** in the destination by

 **3%**
YEAR ON YEAR⁶

² Commercial targets are in line with the ambition for the overall Ireland’s Hidden Heartlands destination
³ data source: Fáilte Ireland’s Survey of Overseas Travellers
⁴ data source: main hotels in the destination
⁵ data source: key occupancy data from main hotels
⁶ data source: visitor numbers from key attractions and activity providers



Slow travel

Prior to the advent of the modern transport technology, the earliest forms of tourism were slow. The pilgrimage routes, the Grand Tour, and similar romantic, cultural or religious journeys were antecedents of what we refer to now as slow travel. This way of travelling includes active, sustainable and enjoyable ways of moving around a destination, experiencing local food and drink, with real engagement with people and local culture en route.

Through slow travel, people seek an antidote to a faster pace of life, prefer train, coach, cycle and on foot travel, and look for tourist experiences focusing on landscape, culture and interaction with other tourists and the host community. By travelling slowly, people are not just choosing a mode of transport; they are also negotiating with place, the environment and their personal identity as a tourist.

“

What we have here is amazing”

Slow travel is about taking time to enjoy the journey and to engage authentically with the places and people en route. Environmental concerns are core to some slow travellers and a key ingredient to be promoted if slow travel is to make a meaningful contribution to reducing the carbon footprint of tourism⁷.

“

It’s about the encounter with people”

⁷ JE Dickinson, L Lumsdon, D Robbins, 2011 Slow Travel; issues for tourism and climate change. Journal of Sustainable Tourism 19(3), 281-300

03 Foundations

The place – our assets, our appeal

The Lough Derg Marketing Group has focused on co-ordinating destination development across the lake wide geography. This joined up approach has brought many benefits and provides a strong foundation for a new approach to growing the visitor economy which focuses on the **distinctive attributes of different parts of the lake region**.

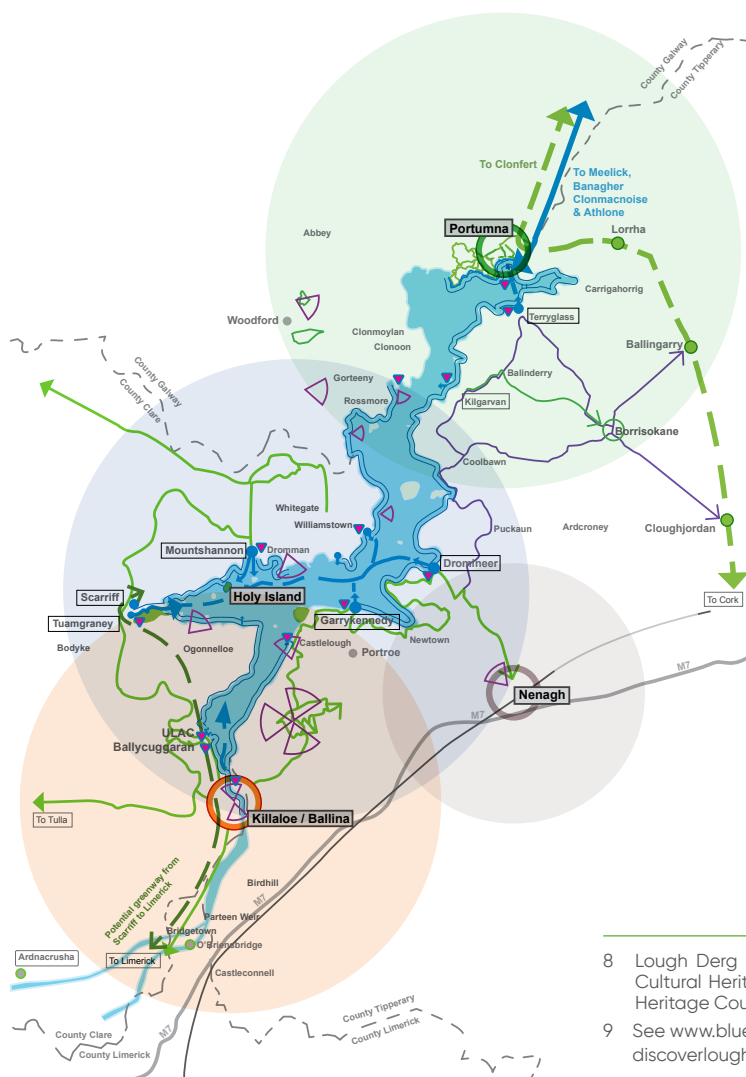
This approach roots the plan in the **authentic experiences of places** that is at the core of the slow travel approach and also acknowledges the **varying stages of destination development** around the lake.

Places are formed by layers of history, seen and unseen, and are shaped by the people who call it home. This sense of place is experienced by the

visitor to a large degree by the options available for moving around, for eating, drinking and sleeping.

Detailed inventories have been prepared by the LDMG of the historic features, the stories, and the rich natural diversity of the lake⁸. The Lough Derg Blueway and discoverloughderg.ie websites contain listings of attractions, and places to eat and stay⁹. The next step in destination development is to bring what is **distinctly Lough Derg** to the forefront and **coalesce these assets into cohesive geographies** that can be experienced by the visitor.

From the visitors' point of view, we can start to imagine Lough Derg as a place of **four cohesive experience areas** within the overall Lough Derg Destination.



“visitors need to know the proximity of places to each other, a sense of destination”

“encourage people to stay in an area – clustering”

“hubs around the lake”

8 Lough Derg on the Shannon Nature Trail, Lough Derg on the Shannon Cultural Heritage Trail, Tipperary, Clare and Galway County Council, the Heritage Council of Ireland, Fáilte Ireland
 9 See www.bluewaysireland/destinations/loughderg.ie and www.discoverloughderg.ie”

Killaloe/Ballina Destination Hub

A natural playground with fresh perspectives on this iconic Shannon crossing



“

Visitors need to know the proximity of places to each other, a sense of destination”



Hill walking, Ballycuggeran

This is a place where the mighty Shannon river rushes through the iconic 13 arched bridge connecting the destination twin towns of Killaloe and Ballina. There are unique views and perspectives from the town streets, and the legacy of Brian Ború is widely visible in the town and experienced through the mythology of the surrounding landscape.

It is a place where visitors can stay in hotels by the water or berth at the marinas, follow the Lough Derg Blueway canoe trails and enjoy year round angling and water sports. Activities can be experienced at your own pace – gentle or high-energy, catering to all ages. The towns have short and long looped lakeshore and mountain walks on their doorstep. There are options to combine walking, kayaking, road cycling and boat trips – potentially taking in the high point of Tountinna, “the hill of the waves”, Portroe lookout, the Lough Derg Way, the Nenagh cycle network, Castlelough forest on the shoreline and long or short canoe trails. To the east, the hiker can explore Moylussa,

the highest point in Co. Clare and trek back down again to safe water playgrounds at the UL Activity Centre and Twomilegate.

This is the ideal starting point to hire boats and angling equipment for a fishing adventure on Lough Derg. Trolling for Trout and Pike is an excellent fishing method on this stretch of water. Twomilegate has numerous fishing stands suitable for Coarse angling.

Work under way will free up the twin towns from heavy traffic and reinforce the historic character of the iconic river crossing point. New projects are planned to connect the towns to Limerick via a greenway passing by the industrial marvel of Ardnacrusha.

“

Millennium Cross /Tountinna – an hour there is like a day off”

Holy Island and connected destination villages

Journeys across lake waters to refresh, revitalise and renew



“

Holy Island is not enough to keep people here – things need to be linked”

Inis Cealtra / Holy Island

This middle part of the lake is connected by water rather than land routes and has the highest concentration of lakeshore settlements; Mountshannon, Dromineer, Garrykennedy, Scarriff, Tuamgraney – a legacy of the historic importance of the Shannon navigation as the key transport artery of the area. Holy Island and Mountshannon are about to undergo significant works to ensure that visitor access to the island is managed sensitively into the future.

Here you can follow ancient spiritual routes across the lake connecting lakeshore villages and harbours historically linked with the productive lands on shore, shop for warm rugs and meet the weavers, explore shoreline, river and islands by canoe, eat the scenery, join food, art and craft classes and workshops and do yoga by the water. It is an excellent area for mayfly fishing from mid-April to mid-June and there are opportunities for anglers to day trip from one side of the lake to the other. Fishing boats can be launched from lakeshore villages



Tuamgraney and Williamstown offer good opportunities for shore angling for coarse fish. Mota has a purpose built floating pontoon with universal access for all anglers.

Portumna Destination Hub

Forest bathing and wild swimming at the Port of the Oaks, the splendour and tragedy of Ireland's lived history at the junction of historic land and water routes



Portumna Abbey

“ We need to come together”

Portumna is a deeply historic town on the edge of Lough Derg close to forests and mountains and with visitor attractions and places that lay bare the splendour and tragedy of lived Irish history. This is most starkly experienced at the Irish Workhouse Centre and Portumna Castle. The surrounding landscapes are formed by oak, stone and water and Portuma is the starting point for longer river and land journeys along the Shannon and the Beara Breifne Way.

The Lough Derg Blueway offers canoe trails along and across the lake, and there is a strong angling culture. Portumna Forest Park provides easy cycles through the trees. Nearby villages have spiritual stories to tell – Abbey, Lorrha, Woodford – and there are boat trips to the leafy lakeside village of Terryglass.

Portumna is good destination to set off for Pike and Trout trolling with excellent facilities and boat hire available. There is an abundant availability of coarse angling stands along excellent waters.

“ The town needs to drive it”



An Sibin horse riding centre

“ The Slieve Aughtys are really important”

Nenagh Gateway Town

A bustling market town, steeped in heritage, with a great reputation for food and new stories to tell



Nenagh's Historic Quarter

Nenagh is strategically placed to both act as a destination in its own right and as a gateway to the Lough Derg region. Key rail, bus and motorway infrastructure makes Nenagh the first encounter of the Lough Derg region for many visitors.

The town's strong food culture, accommodation, cycle network, walking links along the Nenagh River to the Lough Derg lakeshore and significant plans for the Historic Quarter, give the town a core role in the development of the broader destination.



Nenagh River

Getting here and around



How close are places to each other?”

Lough Derg is easily accessed by **motorway, national and local roads** – but also easily passed by as visitors are drawn along the motorway network to locations further west. Lough Derg signage has been installed at key locations on motorways – the challenge is to develop visitor experiences that are of sufficient motivating appeal to disrupt current visitor movement westwards.

The **historic train stations** at Nenagh, Birdhill and Limerick are key sustainable transport assets for the region and the option to journey by train is appealing to visitors engaging in slow travel. Arriving by train also offers opportunities for visitors to engage with the history of the former rail connections with Killaloe/Ballina. Nenagh and Limerick are also well served by **national bus services**.

Our visitors also access Lough Derg by water along the **Shannon navigation** – many starting their Shannon journey by hiring a cruiser at Portumna or Banagher. Hiring a cruiser is also a good way to explore the angling potential of the lake.

More of our visitors will be arriving to Lough Derg **on foot or by bike** as the current network of long distance way-marked ways develops, and as greenway links with Limerick progress.

The Lough Derg Blueway **canoe trails** developed to date also offer potential for canoe based travel, or **combining canoe, walking and cycling** as ways to move around the destination if the supporting visitor services can be developed. Current visitor movement patterns mean that some of the infrastructure developed over recent years is well used, while other areas, particularly on the northern and north eastern part of the lake are less used.



It's quite a dispersed experience”



Mounthannon

The enabling policies

The LDMG member agencies have progressed the development of the destination by working together to align their internal priorities and policies. There is now an opportunity to widen this “whole place” approach to enabling destination development and for Lough Derg to take advantage of new national tourism policy.

The policy landscape enabling visitor experience development

Local Authority Policies

Local Authority Policies for Tourism, Infrastructure, spatial planning and environmental protection include:

- The County Tourism Strategies of Counties Tipperary¹⁰, Clare¹¹, Galway¹² and Limerick¹³
- The policies for towns and villages in the Lough Derg region^{14 15}
- County Council sustainable mobility policies including diversion of through traffic and public realm improvements in towns

10 The Tipperary Tourism Development Strategy 2016–2021 has identified Nenagh as a Priority Level 1 “Gateway town”, Terryglass, Dromineer, Borrisokane and Ballina as Towns/villages with “strategic potential” and Birdhill, Cloughjordan, Lorrha, Portroe and Ballingarry as towns/villages with “potential to attract stop-offs”.

11 Clare County Council is undertaking a tourism planning process that will result in a ten-year Tourism Strategy for the County. The Audit and assessment of tourism product and operators. In the East Clare area, W2 Consulting, recommends a focus on Activity tourism in East Clare. Clare County Council are progressing the opening up of Holy Island as a significant visitor attraction.

12 In 2016 Galway County Council launched a consultation process on tourism strategy to 2025.

13 The Limerick Tourism Development Strategy 2019–2023 “Into the Blue” theme includes the Limerick to Lough Derg journey as an “iconic itinerary on water” highlighting key cultural and natural heritage sites along the way and the ambition to develop a Blueway in collaboration with Waterways Ireland and Clare County Council.

14 Portumna is a key town in the Galway County Development Plan. Portumna Forest Park’s “unique landscape and attractions” is identified as a key economic strength and economic opportunity for Galway. The County Development Plan sets out a commitment to develop tourism in East Galway. The Irish Workhouse Centre, Portumna Castle and Hymany Way are acknowledged as key tourism assets for the region. The implementation of a cycling and walking strategy for Portumna is supported.

15 It is a Tipperary County Council objective to promote Nenagh as a hub for walking, cycling and water based tourism activities and to continue to improve the infrastructure within the town to cater for these activities.

National Strategy for recreation on waterways

The integrated and collaborative Blueway approach underpins Waterways Ireland’s investment in recreation along the waterways. Lough Derg’s Blueway was launched in 2018. Further Blueway developments are being considered by Waterways Ireland at Lough Derg: a Killaloe walkway, an O’Briensbridge and Errinagh Canal Canoe Trail and a Blueway link from Connacht Harbour to Portumna Castle.



A Blueway Management and Development Guide

This guide has been prepared for the development, management and promotion of Blueways. The related Accreditation Criteria for Blueways on the Island of Ireland combines a visitor-focused approach with fundamental safety, technical, access and environmental components.

IWAI Tranquillity Zones

The Inland Waterways Association of Ireland (IWAI) Tranquillity Special Interest Group has been working on the concept of “Tranquillity Zones” to provide opportunities for boaters to experience the tranquillity of the waterway whilst having the facilities of a town or village accessible by dinghy. Referred to as tranquil-lite moorings they are located close to the towns and villages along the waterway. Pilot ‘tranquil’ locations have been developed at Scarriff River, Killaloe and Portumna. The IWAI plan to publish a guide displaying tranquil locations and tranquil-lite sites along the Shannon Waterway.

National Outdoor Recreation Policy

The Outdoor Recreation Plan for Public Lands 2017 – 2021 enables collaborative inter-agency working to progress outdoor recreation on state lands. The Strategy for the Future Development of National and Regional Greenways recognises the significant local benefits to local rural economies of developing off road trails.

Coillte Nature

Coillte has recently launched its not-for-profit venture, Coillte Nature, which sets out to protect sections of its estate for biodiversity and recreation.

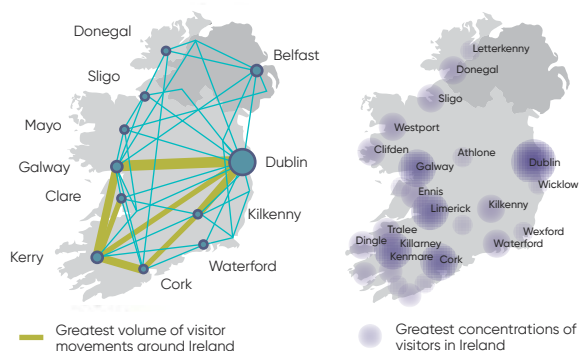
European Water and Agricultural Policy

As EU agricultural policy changes after 2020, direct payments will be conditional on enhanced environmental and climate requirements. The European Water Framework Directive requires Ireland to demonstrate improvements in the quality of water in lakes and rivers including effective catchment management.

Ireland's Hidden Heartlands

National tourism policy is focused on a better regional spread of visitors. International visitors are focused at the moment on key areas in Ireland's east, west and south¹⁶.

Lough Derg is geographically well positioned to step up to this national challenge due to its proximity to high volume areas, its location in relation to key visitor routes and the investment in infrastructure carried out over the lifetime of the previous Roadmap.



How international visitors move around Ireland



The new national experience brand - 'Ireland's Hidden Heartlands' - seeks to reposition the Shannon region and communicate the variety and vibrancy of the region's attractions to a growing number of potential visitors in key target markets. Lough Derg now finds itself in a region that will be promoted nationally as a place where you can;

¹⁶ Data source: Fáilte Ireland

¹⁷ National Trails Office, Sport Ireland

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

The Shannon – A Tourism Masterplan (2020-2030)

This Lough Derg Visitor Experience Development Plan has been developed in parallel with the Fáilte Ireland Shannon Tourism Masterplan.

The Shannon Tourism Masterplan is an overarching "unitary framework" and is based on three broad themes:

- The Shannon, Mighty River of Ireland
- The Natural, Timeless Shannon
- Shannon Journeys and Adventures

Beara Breifne Way

The Beara Breifne Way runs through the Lough Derg region taking in Cloughjordan, Ballingarry, Lorrha and Portumna. This long distance walking route is planned to be one of Ireland's Hidden Heartlands' "transformational signature products of scale".

Fáilte Ireland aim to work with communities along the route to develop the trail into an internationally motivating and compelling visitor experience and to maximise the economic potential of the Beara Breifne Way to towns, villages and communities. An audit of the trail route and visitor facilities has been prepared and will identify all remedial works and upgrades of the trail required to bring it up to National Waymarked Way standards¹⁷.

The ongoing focus will be on enabling communities to develop off-road sections of the route and on strengthening linkages to key visitor attractions, historic sites and activity locations within a 5km corridor of the trail.

Other national Tourism Strategies such as the **Food and Drink Strategy 2018-2022** are also supportive of the Lough Derg region's development as a destination.

National Climate Action Plan 2019 and Local Adaptation Strategies

The National Climate Action Plan includes actions to develop new rural transport strategies and targets for modal shift and emissions reductions, greater public access to forests and technical training for Local Authority staff through the Climate Action Regional Offices.

04 Market Assessment

Volume and value of tourism

Overseas tourist visits to Ireland in 2018 grew by 6.6% to 9.6 million. Overseas tourists from Mainland Europe rose by 7.8%, while other markets continued to grow. North America performed very strongly, increasing by 14%. The long-haul markets also increased by 7.7% in 2018. Great Britain recorded growth of 1%.

Mainland Europe was, in 2018, the Republic of Ireland's biggest source market for overseas tourists, representing 36.5% of all such visits (and 35.3% of spending by overseas tourists). The next biggest source market is Great Britain, which accounts for 36.2% of international volume and 19.6% of spending by overseas tourists. Some 20.4% of overseas tourists come from North America. The balance, 6.8%, comes from other long-haul markets.

TABLE 1: Tourism Numbers 2014 – 2018¹⁸

| Numbers (000s) | 2014 | 2015 | 2016 | 2017 | 2018 |
|----------------|-------|-------|-------|-------|-------|
| Total Overseas | 3,596 | 4,265 | 4,638 | 4,923 | 5,217 |
| Domestic Trips | 1,713 | 1,725 | 1,797 | 1,879 | 2,006 |

Economic Impacts and Benefits

In 2018, out-of-state tourist expenditure amounted to €5.6 billion. This represented a growth of 6% on 2017. Combining spending by international tourists with the money spent by Irish residents taking trips here and receipts paid to Irish carriers by foreign visitors, total tourism expenditure in 2018 was estimated to be €9.4 billion representing 3.7% of Gross National Product in revenue terms. An estimate of all jobs in the tourism and hospitality industry based on past Fáilte Ireland surveys of businesses (full-time, part-time, seasonal/casual and not confined to 'main' job) indicates that total employment in the sector in 2018 was approximately 260,000.

TABLE 2: Tourism Revenue 2014 – 2018¹⁹

| Revenue (€m) | 2014 | 2015 | 2016 | 2017 | 2018 |
|----------------|-------|-------|-------|-------|--------|
| Total Overseas | 7,105 | 8,036 | 8,742 | 9,023 | 9,607 |
| Domestic Trips | 8,991 | 9,125 | 9,359 | 9,626 | 10,919 |

Regional Performance

As data isn't currently being captured specifically for the Lough Derg area, it is possible to paint a picture of the performance of the wider area within which it sits. This area includes counties Tipperary, Clare, and Galway.

Table 3: Regional Performance: 2017²⁰

| 2017 | Overseas Tourists (000s) | Overseas Tourism Revenue (€m) | Domestic Tourists (000s) | Domestic Tourism Revenue (€m) |
|-----------|--------------------------|-------------------------------|--------------------------|-------------------------------|
| Tipperary | 192 | 88 | 496 | 92 |
| Clare | 749 | 158 | 362 | 86 |
| Galway | 1,673 | 589 | 1,024 | 247 |

In terms of the source markets for tourism to the region, a profile of the Mid West Region which includes North Tipperary, Clare and Limerick indicates that in 2017, 34% of overseas tourists came from Mainland Europe; 33% from North America; 25% from Great Britain and 8% from long haul markets. 54% of overseas holiday makers to this region were over 45 years of age; 50% travelled as part of a couple and 60% were classed as white-collar workers.

In terms of their travel arrangements, 86% arrived by air; 66% travelled independently and 66% used a car to get around. For 70% of these visitors, this was their first visit to Ireland; 51% of holiday makers stayed in hotels and the average length of stay was 2.7 nights. Closer to home, trips from residents in Northern Ireland to this region amounted to 31,000 with an associated spend of €15m.

Waterways Ireland Visitor data

Waterways Ireland research carried out in the Summer of 2017 found that the average local spend per visitor per trip to a waterway was;

- Domestic: €137.80
- Overseas: €576.30

¹⁸ Source: Fáilte Ireland

¹⁹ Source: Fáilte Ireland

²⁰ Overseas visitors and associated revenue data is derived from Fáilte Ireland's Survey of Overseas Travellers (SOT), which conducts 10,000 interviews with departing overseas tourists at major air and sea ports. The domestic figures are derived from CSO data.

Popularity of visitor attractions in the Lough Derg

Fáilte Ireland currently complete visitor numbers for the following attractions;

Table 4: Visitor Attractions in the Ireland's Hidden Heartlands Lough Derg Region: Numbers

| Visitor Attraction | No of Visitors Per Year | | |
|-------------------------------|-------------------------|-------------|-------------|
| TIPPERARY | 2016 | 2017 | 2018 |
| Nenagh Heritage Centre | 2,664 | 2,468 | 2,531 |
| Nenagh Genealogy Centre | 795 | 908 | 979 |
| Nenagh Castle | 11,852 | 18,797 | 13,373 |
| CLARE | | | |
| Irish Seed Savers Association | 4,800 | | |
| GALWAY | | | |
| Portumna Castle | 14,093 | 15,665 | 20,458 |
| Irish Workhouse Centre | 6,386 | 8,350 | 11,500 |

Accommodation

In 2014, the Lough Derg Roadmap identified an estimated 64 accommodation establishments within the immediate Lough Derg area, the majority of which were small scale B&Bs and self-catering units.

At the moment, large hotels are located in Killaloe/ Ballina and Nenagh, and beyond these towns, a range of types of accommodation is offered across the destination including country houses, glamping, holiday homes, rental homes, AirBnB accommodation, marinas, B&Bs and an Aire de Service for recreational vehicles.

The most recent official Fáilte Ireland accommodation data available for the Lough Derg area (extending from Portumna to the Slieve Aughtys to O'Briensbridge and Nenagh) is set out below:

| Type of Accommodation | Premises | Bed Spaces |
|---|-----------|--------------|
| Hotels | 5 | 504 |
| Bed and Breakfasts | 18 | 167 |
| Self-Catering | 14 | 761 |
| Fáilte Ireland Welcome Standard ²¹ | 4 | 97 |
| Caravan and Camping | 1 | 270 |
| Total | 42 | 1,799 |

The total bed spaces in approved premises is therefore **1,799** with the majority of these self-catering accommodation or hotels. This figure does not include businesses not registered with Fáilte Ireland, berthing spaces or AirBnB properties, many of which offer the visitor homely and interesting properties close to the water.

Opportunities exist to provide more by way of alternative accommodation, offering visitors active days and cozy evenings. Activity friendly accommodation will be important for destination development including rentals that include bikes or boats.

The feasibility of low impact accommodation options in some lakeside forests close to settlements can be explored.

Several towns and villages – particularly the handsome towns of Portumna and Borrisokane – have the potential to support pilot “scattered hotel” projects as outlined in the Fáilte Ireland Destination Towns Guidelines. This innovative concept brings immediate benefits in terms of addressing underused or vacant buildings, providing authentic experiences and direct local economic gain – see pg 31 for details.

²¹ A quality assurance standard for innovative and quirky tourism accommodation businesses

Future prospects – understanding our visitors and what they want

Key trends in consumer preferences

- Visitors are increasingly seeking authentic and personalised travel experiences
- Visitors are increasingly looking to experience a local’s way of life and to seek more well-rounded views of the places they encounter
- Travellers are demanding more information, control, interaction and personalisation
- Visitors are beginning to imbue their downtime with constructive activity and meaning centred around acquiring new skills and knowledge – this is known as Constructive Tourism
- The concept of wellbeing has evolved to become a mainstream consideration in response to unprecedented levels of sedentary behaviour – stress relief is found in physical activity and mindfulness
- The consumer desire for a digital detox is growing. With strong ties to health and wellbeing but serious challenges to control, two trends are emerging; The Power of Quiet – the wish to go “off grid” and Casual Connectivity – the need to keep in contact / document their experience whilst enjoying downtime

Key markets for Lough Derg

The **domestic** tourism market sustains a level of investment in tourism product that is of considerable benefit to the attractiveness of a destination, and domestic demand also maintains sector revenue during non-peak periods.

While the size of the domestic market suggests that there are important benefits to encouraging and sustaining domestic tourism, the potential for further growth is more limited when compared with international demand. This domestic market was the main priority in Fáilte Ireland’s marketing campaigns in 2019 thereby creating awareness among the domestic audience. However, the sector’s best prospects for growth are in generating increased levels of **overseas** revenue.

The focus of this strategy is to gradually increase the contribution of markets other than the domestic – in order of importance; visitors from Mainland Europe, North America and Great Britain which currently represent some 34%, 33% and 25% respectively of visitors to the wider region.



“We need to develop supportive services – hold people to the lake”

Our visitors are looking for experiences that are tailored to their own motivations. Motivating experiences are ones that will resonate with the audiences we are seeking to attract. They will elevate the core and authentic strengths of the destination.

They are seeking inspiration from how other travellers – friends, family, influencers – are shaping perceptions with content accessed across a range of sources including from other travellers telling their own stories.

We need to match visitor motivation with experience development.

Tourism Ireland and Fáilte Ireland will continue to target Ireland’s key ‘culturally curious’ audience, who have the strongest propensity to visit the island of Ireland. They will also reach out to the ‘social energiser’ and ‘great escaper’ audiences in markets where significant potential exists. Tourism Ireland will also target niche segments – including golfers, business and incentive visitors, as well as the diaspora in Britain, North America and Australia.

At present, Ireland’s Hidden Heartlands has a 2% share of overseas visitors and a 3% share of domestic visitors. The overall growth target for Ireland’s Hidden Heartlands is 3% year on year, dependent on significant capital investment in the region.



Domestic Visitors

Connected families, multi-generational

This segment accounts for 23% of the domestic market. Groups are multi-generational. They are made up of parents in their thirties and early forties and children generally under the age of ten. For Connected Families, family holidays are the best weeks of the year and a special opportunity to spend quality time together, creating memories to last a lifetime. They put their heart into planning and finding out everything a destination has to offer, the best places to stay, the hidden gems and all the activities available that can be shared by adults and children together. For them it is not about having a plan for every day rather knowing that there are lots of ‘things to do together’ nearby and making sure their accommodation and facilities really suit their needs.

What they want

- On average, family breaks tend to last between four and seven days and they are most likely to stay in hotels or holiday homes.
- These families are looking for opportunities to spend time together through shared experiences - it's less about the place and more about the way they connect.
- Parents want to make the most of the opportunity to really ‘be’ with their children and love to see them do and enjoy the same simple things they did when they were children themselves.
- Getting basic things right such as providing opportunities to sit outside and look at water and easy ways to be together in nature are important.
- The family audience is a highly consumerist market and as such it's used to being able to tailor products to suit their specific needs.
- They want easily consumable experiences within easily defined geographies.
- Good food, and good food choices for their children are becoming increasingly important.

More detail on this market and how Lough Derg can provide what they are looking for is set out in Appendix A.



Larkin's Bar and Restaurant, Garrykennedy

Footloose socialisers, Generation X

Footloose Socialisers make up 15% of the domestic market. On average in their late forties and well educated, they are made up of groups of friends that enjoy getting away and spending quality time together.

What they want

- Being with like-minded people, whether they're old friends or new acquaintances
- To go off the beaten track every now and again, try out different places, meet the locals and really get under the skin of a place.
- To enjoy good food and drink and get into the history and culture of the place they are visiting.



The Lookout, Portroe

Overseas Visitors

Great Escapers, Millennials, Generation Y

Generally couples, about 30 years old, some have babies or quite young children. Most are in serious need of time out from busy lives and careers. They are specifically interested in rural holidays and travel very much as a couple or family.



What they want

- Great Escapers are on holiday for a break, to get physical with nature, and to reconnect with their partner.
- They are more likely to take part in slightly more strenuous, but not extreme, exploration on foot, by bike or by boat and are more interested than other segments in getting connected to nature to feel the earth beneath their feet, to soak up the beauty especially the more remote and exciting places.
- They appreciate peace and quiet between activities.
- A sense of history, of their place in the vastness of nature – they want to feel part of it.
- But it's important that getting away from it all is easy enough – they want the 'wow' factor without too much effort.
- They enjoy self-guided food and foraging walks and trails that are linked to landscape, producer experiences such as farm visits, visiting specialist food shops, bakeries, high quality food trucks and markets.
- Most importantly, Great Escapers want to come home refreshed and revitalised, their batteries recharged.

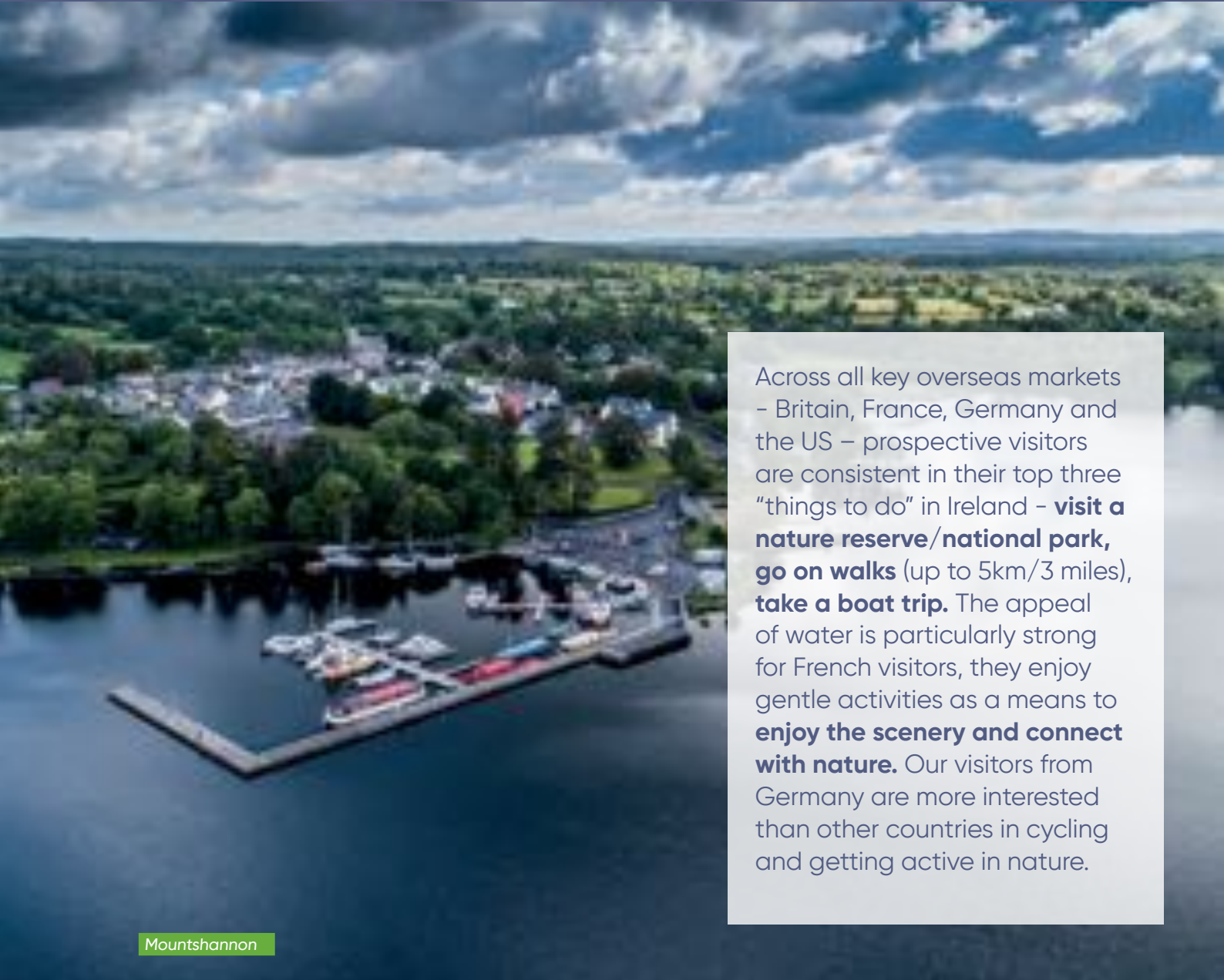
Culturally Curious, Baby Boomers

The Culturally Curious, Baby Boomers market is also relevant to Lough Derg: They're interested in all that a place has to offer and they want it to be authentic. They won't choose to visit a place just to follow the herd. They are three times more likely to take long breaks than average, but they also take more short breaks than average, both at home and overseas. They are unlikely to return for a while unless a destination is truly diverse, preferring to move on to new discoveries.



What they want

- This is their own exploration and they really want to cover everything
- They want activities, not just relaxation
- They expect hassle free, convenient experiences, safety, cleanliness, value
- They love to discover history and always find ways of getting real insight
- They are looking to encounter new places and experiences that are out of the ordinary
- They like to feel that they have not only broadened their mind but also immersed themselves in a place, giving their senses a holiday too – the sights, the sounds, the smells, the tastes...
- They enjoy connecting with nature and getting off the beaten track
- They like people to show an interest and educate them – to feel they've connected.
- They really appreciate personal guides
- Most likely to stay in a hotel, self-catering accommodation or a B&B as long as there's a lot to see.
- They will usually choose somewhere with access to scenery and good walks



Mountshannon

Across all key overseas markets – Britain, France, Germany and the US – prospective visitors are consistent in their top three “things to do” in Ireland – **visit a nature reserve/national park, go on walks** (up to 5km/3 miles), **take a boat trip**. The appeal of water is particularly strong for French visitors, they enjoy gentle activities as a means to **enjoy the scenery and connect with nature**. Our visitors from Germany are more interested than other countries in cycling and getting active in nature.

Waterways Ireland visitor surveys

Waterways Ireland carries out annual visitor surveys – the 2017 results provide insights into the people who come to Lough Derg to enjoy being on or near the water.

- The average visitor group consists of 2 adults and 1 child.
- Almost 1 in 5 waterways users are overseas visitors, half (49%) are domestic and 1 in 3 (34%) are local visitors.
- Overseas visitors spend the most time on the waterways per visit as they spend an average of 4 days, out of an average 13 day visit to Ireland, on the waterways.
- Walking is by far the most popular activity conducted on the waterways, with 42% of all users claiming to walk regularly along the waterway. Walking is followed by boating (private cruiser/barge and boat trip) and angling.
- Some activities are more popular than others on specific waterways: Boating by private cruiser/barge is more popular on the Shannon than on other waterways
- There is a growing trend in the domestic market for cruising



Food Tourism

'Food tourism' is not only a niche opportunity for tourism in Ireland but it has a specific relevance for the Lough Derg area. Artisan foods in particular present opportunities to showcase local ingredients and specialties. Fáilte Ireland have responded to the opportunity to increase food tourism through the Taste of Ireland initiative. The focus of this initiative is on meeting producers, attending food and drink festivals, participation in traditional skills, opportunities to forage and fish, see farmers working, and enjoy the best of modern Irish cuisine. Industry supports are available through Fáilte Ireland's "Taste the Island" workshops. Lough Derg will focus on food tourism experiences that showcase the best that the region can offer.



Food producers and restaurant owners surrounding Lough Derg join forces on an annual basis to promote the region as a food tourism destination. Supported by the Lough Derg Marketing Group, A Taste of Lough Derg is now in its fifth year and has featured over 30 food events taking place in villages and towns along the shores of Lough Derg in counties Clare, Galway and Tipperary. In 2019 a more focused Taste of Lough Derg event included 10 events in September.

Current international marketing for the Ireland's Hidden Heartlands region promises;

"a wealth of small-scale independent food and drink producers and honest to goodness fare. Here slow food is exemplified by innovative farmers, award-winning restaurants, creative cafes, eclectic markets and proud local festivals".

These are the food experiences that will be promoted as part of Lough Derg's Visitor Experience Development.

Angling Tourism

There are over 400,000 recreational anglers in Ireland contributing €800m per annum to local communities and supporting 11,000 jobs²².



In 2017, 135,000 international visitors participated in angling in Ireland, with an estimated spend of €280m²³.

Overseas anglers stay longer, are repeat visitors and spend more than the average visitor, contributing to seasonal and regional distribution. Lough Derg is open all year round for both pike and coarse fish. Angling for trout is available from March 15th to September 30th and the lake is especially famous for its early Mayfly season which can start as early as mid-April.

Coarse fishing is also renowned on Lough Derg, especially before and after spawning when big numbers of bream and roach enter the Shannon river at Portumna heading to their spawning grounds.

Boats for fishing can be hired in Killaloe, Mountshannon, Portumna, Terryglass, Dromineer and Garrykennedy. Local guide services can be hired for half a day or a full day in many of the towns and villages around the lake. There are opportunities for making fishing and guides more accessible to visitors around the lake and building of the existing "fishing for kids" experiences.

When angling is bundled with other land- and water-based activities and experiences for families, children and non-specialists, the proposition can be broadened for greater appeal. The role of angling competitions is also important in the promotion angling to international visitors.

22 ESRI, 2016

23 Angling Tourism Marketing Strategy, Inland Fisheries Ireland, 2019

What tourists are looking for in our towns

Generally, the factors that make a town a quality place for residents are also what makes it a good place for tourists. Focusing on improving the visitor experience in towns also provides the opportunity to draw on existing funding streams such as the Rural Regeneration and Development Fund.

The key towns in the Lough Derg region; Killaloe/Ballina, Portumna and Nenagh will be developed in line with the Destination Town guidelines produced by Fáilte Ireland. These factors are well-established on the urban and social agenda for Local Authorities and include:



Research²⁴ has shown that holiday makers visiting towns in Ireland want to;



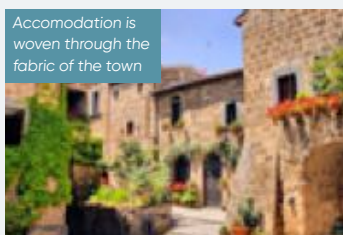
- access nature close to urban centres as a means of getting the best of urban and rural,
- explore the waterline by boat,
- sit outside a pub/café and people watch,
- take a tour where a guide tells you the story of the area,
- spend an afternoon exploring/ strolling around a picturesque town
- listen to traditional music in a local pub and experience the local entertainment scene, and
- visit a festival celebrating local culture, food and heritage.

A new approach to developing visitor accommodation - Alberghi Diffusi/Scattered Accommodation

The Scattered Accommodation model uses the town to provide the various elements of a hotel.



Low-scale impact in a small hotel, compared to a traditional hotel building



Accommodation is woven through the fabric of the town

Opportunity/Challenge

As is the case in many parts of the world, small towns and villages in Italy have struggled to sustain their communities in the face of increasing urbanisation and migration to cities.

Approach

The Scattered Accommodation concept repurposes historic buildings to provide a range of services across a variety of buildings that are within walking distance of each other. It is a creative solution to providing accommodation in smaller towns that are lacking in overnight options for visitors, while also addressing the challenge of what to do with empty buildings. It also facilitates the integration of tourism within the local community. Advice of the local planning authority should be sought in relation to developments or renovations that facilitate the scattered accommodation concept.

Outcomes

It has become an important driver for the regeneration of some smaller towns and villages in remote areas of Italy. The National Association facilitates the sharing of learning and of marketing.

24 Targeting British Holidaymakers, Targeting French Holidaymakers, Targeting German Holidaymakers, Targeting US Holidaymakers, Visitor Attitudes Survey; Travel profiles – Britain, Germany, France & USA, Fáilte Ireland

05 Gearing Up

The Lough Derg Marketing Group is an award winning initiative and an example of successful inter-agency co-operation and strategy development. The current group meets four or five times a year and the individual agencies and sub-committees progress the implementation of projects, programmes and marketing activities.

Between 2014 and 2015, a Tourism Co-ordinator based in Tipperary County Council and funded by the EU TRAP INTERREG project, steered the implementation of projects and programmes around Lough Derg.

As Lough Derg evolves as a Destination, the LDMG's overarching role will become more important. The Ireland's Hidden Heartlands experience brand and Shannon Tourism Masterplan brings a new focus to driving a collective shared vision for the region. The strengthening role of the LDMG as an enabler of the growing visitor economy suggests a new title for the grouping –

Destination Lough Derg

This Destination Management Organisation will include as its remit:

- managing the developing **local visitor economy**,
- **local capacity building** and working with Fáilte Ireland on rolling out of training and supports across the tourism industry, and
- supporting **collaborative working between tourism businesses** and **clustering of experiences within each Destination hub** – this would draw on the collective work already underway including the Heartlands Heritage Group, for example, in the northern lake region, the Tipperary Food Producers network, Chambers of Commerce and other groups around the lake,
- Protecting and enhancing the **environmental resource on which tourism is based**.

Governance and continuing the collegiate approach

Destination Lough Derg will continue to include all key agencies with a role to play in developing the visitor economy of Lough Derg and include consistent representatives from each member agency and a representative from each destination hub:

- Tipperary County Council
- Galway County Council
- Clare County Council
- Clare Local Development Company
- Galway Rural Development Company
- North Tipperary Development Company
- Waterways Ireland
- Fáilte Ireland
- Inland Fisheries Ireland
- Portumna Destination Hub representative
- Killaloe/Ballina Destination Hub representative
- Connected Lakeside Destination villages representative
- Nenagh Gateway Town representative

To ensure effective co-ordination and delivery of this VEDP, a new dedicated **Tourism Officer for Lough Derg** will be appointed, reporting to Destination Lough Derg. Administrative support will be provided by a dedicated clerical resource.

Destination Lough Derg would represent the region within the destination management structure of Ireland's Hidden Heartlands.

Supporting collaborative working within the destination

A key trend in Destination Development is that communities and business people are becoming more engaged in the development and management of the destination experience. The engagement of businesses is also important for clustering of experiences for visitors and gathering of destination data.

Terms of reference will be drawn up for a representative for each Destination hub who will engage with the Destination Lough Derg group and communicate with the relevant tourism businesses and groups within the destination hub.

Case Studies

1. The Destination Fermanagh partnership

The Destination Fermanagh partnership has drawn representatives from both the private and public sectors. Over 80 individuals are now involved in this partnership, including a number of Delivery Groups which focus on Training & Visitor Servicing, Infrastructure, Events, Recreation & Activity and History & Heritage.

2. Slow Adventure Leitrim

Slow Adventure Leitrim (slowadventure.ie) is a new clustered tourism experience which emerged from the Slow Adventure in Northern Territories EU initiative. The initiative's aim was to extend the marketing reach of businesses in the slow adventure tourism sector, in order to encourage more tourists to come to experience the outdoors. Slow Adventure Leitrim brings together people and businesses who enjoy displaying their sense of place with visitors by sharing traditional skills, local knowledge, storytelling and spending time together in nature. Each slow adventure has been crafted to offer unique experiences by working with carefully selected people and businesses. Slow Adventure Leitrim is co-ordinated by the Leitrim Tourism Officer.

The Visitor Economy

The concept of the 'visitor economy' acknowledges the whole environment and all aspects of how tourists experience a place.

It recognises the role of individuals, businesses and organisations in ensuring a great visitor experience. While the economic activity of visitors lies at the core of the concept of the visitor economy, its meaning is broader than this and includes all of the elements that make for a successful visitor destination such as;

- All of the things which we know attract visitors; the natural environment, the heritage and culture, a vibrant community, iconic buildings, the shops, leisure and cultural facilities, food, the events, the scenery; all the things which make a place special, distinctive and worth experiencing;
- The infrastructure which helps to reinforce and shape the sense of place and make it an easy place to visit; the transport, trails, parking and orientation, interpretation, public realm, amenities.



Each area should have a representative - then they come together”




We need someone in this part of the lake”

Lough Derg Watersports, Kilgarvan Quay



06 Experience Development



“focus on the things that Lough Derg can do really well”

Lough Derg will frame experience development within four **Destination hubs** with distinctive experiences and each with a cohesive story to tell. This reframing of the geography will provide our visitors with a clear sense of where to stay, what there is to do and see locally and how to get around in fun and relaxing ways.

Each hub is centred on a town or series of connected villages.

Killaloe/Ballina Destination Hub – a natural playground with fresh perspectives on this iconic Shannon crossing

Holy Island and Connected Destination Villages – journeys across lake waters to refresh, revitalise and renew

Portumna Destination Hub – forest bathing and wild swimming at the Port of the Oaks, the splendour and tragedy of Ireland’s lived history at the junction of historic land and water routes

Nenagh Gateway Town – a bustling market town, steeped in history, with a great reputation for food and new stories to tell

Visitor Experience Development in each hub will be driven by the motivations of our most likely visitors;



Ballycuggeran Walks

Connected Families (Multi-Generational)

What they want -

- easy ways to **get into nature**, easily consumable experiences within easily defined geographies.
- straightforward booking
- opportunities for **families to do things together**
- parents enjoying the same simple things they did when they were children themselves.
- **sitting outside** near water
- **good food**, and good food choices for their children

Great Escapers (Millennials)

What they want -

- **getting physical with nature**, but in ways that are easy enough to access
- a chance to **rebalance** and take stock of their lives
- more likely to take part in slightly more strenuous, but not extreme, **exploration by foot, bike or boat** soaking up the beauty especially the more remote and exciting places – peace and quiet between activities
- a sense of **history**
- food that is linked to landscape
- feeling **refreshed** and **revitalised**

Culturally Curious (Baby Boomers)

What they want -

- to discover **history** and always find ways of getting real insight
- **activities**, not just relaxation
- **hassle free**, convenient experiences, safety, cleanliness, value
- to connect with **nature** with good walks
- **personal guides**

Footloose Socialisers (Millennials/Gen X)

What they want -

- Being with **like-minded people**
- **meeting the locals** and really getting under the skin of a place
- enjoying **good food** and **drink, history and culture**

The Framework for Visitor Experience Development

Portumna Destination Hub

Forest bathing and wild swimming at the Port of the Oaks, the splendour and tragedy of Ireland's lived history at the junction of historic land and water routes

Holy Island and Connected Destination Villages

Journeys across lake waters to refresh, revitalise and renew

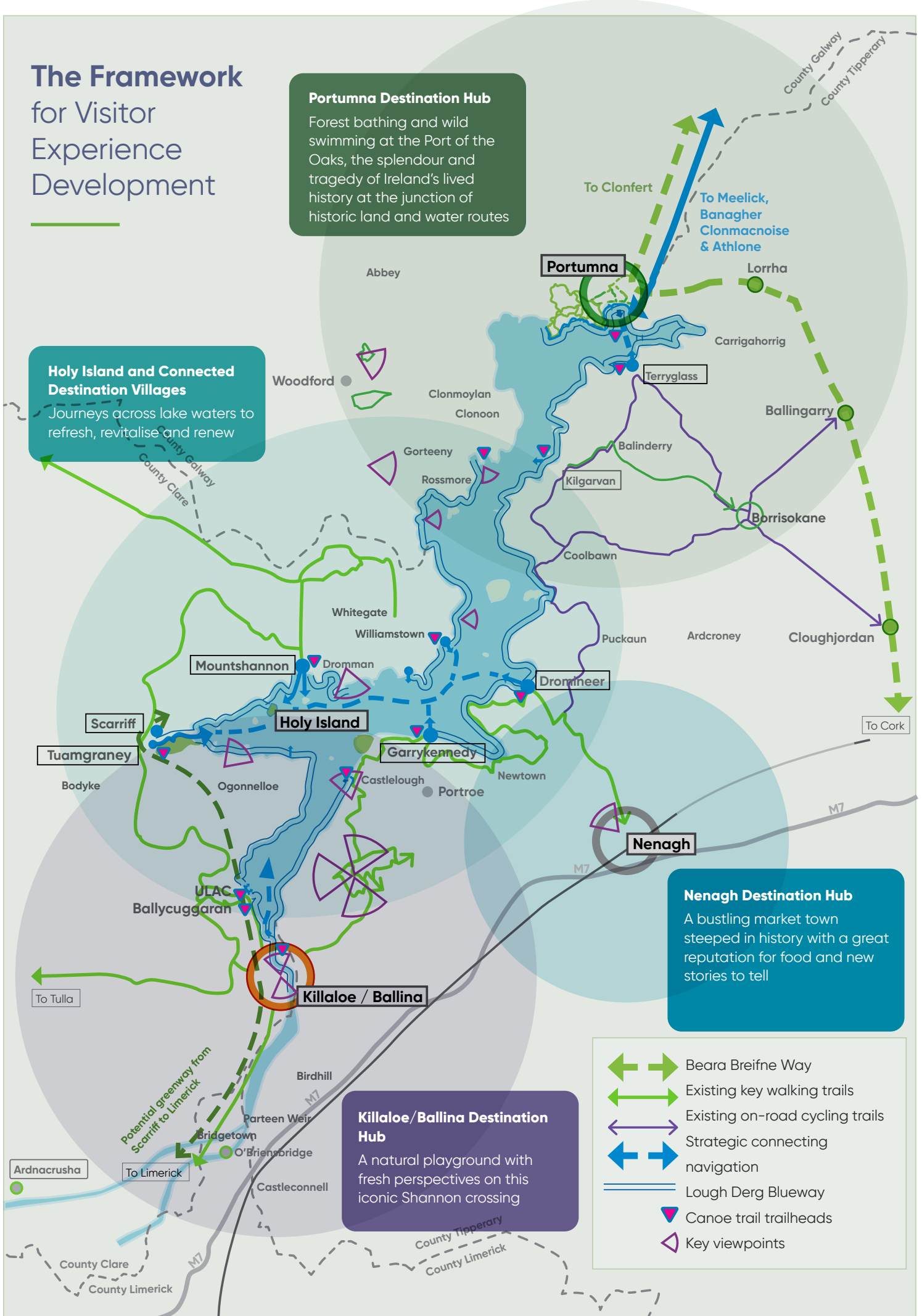
Nenagh Destination Hub

A bustling market town steeped in history with a great reputation for food and new stories to tell

Killaloe / Ballina Destination Hub

A natural playground with fresh perspectives on this iconic Shannon crossing

-  Beara Breifne Way
-  Existing key walking trails
-  Existing on-road cycling trails
-  Strategic connecting navigation
-  Lough Derg Blueway
-  Canoe trail trailheads
-  Key viewpoints



Killaloe/Ballina Destination Hub

A natural playground with fresh perspectives on this iconic Shannon crossing

THE PROMISE TO VISITORS

Outdoor activities on your doorstep, incredible views and safe adventures in, on and along the water starting out from historic twin towns

Lough Derg Watersports



HERO PRODUCT

Jump into Nature from historic twin towns

What we have already

- Historic townscapes and the iconic historic Shannon crossing and bridge** – public realm currently prioritises vehicles and footpaths/road crossings are not universally accessible, new plans are underway to improve the public realm
- Two long distance way-marked trails, the East Clare Way and Lough Derg Way** leading into the mountains and down to the lakeshore on either side of Killaloe/Ballina – however, approach routes to Killaloe/Ballina are on roads with 80kph speed limits and not appealing to families
- Great family hotels** with lake views and indoor facilities for rainy days, iconic views of the Shannon, the hills and mountains, the lake, the townscape
- A wide range of **water activities**; the Lough Derg Blueway, easy canoe loops and safe paddling on the canal, stand up paddling, activities at ULAC, swimming at Ballycuggeran, fishing for kids, cruising, boattrips including themed trips
- A range of great **pubs, restaurants, shops**
- The Brian Ború, ecclesiastical, landscape folklore and industrial heritage stories** – and engaging, tangible stories that can only be told here such as the connections between the Welsh headstones at Castlelough and the slate quarry
- High energy activity events such as **Quest Lough Derg** and venues such as Clarisford Park
- Berthing for **cruisers**
- Angling activity** – pike and course fishing year round, fishing for trout (March 15th to Sept 30th) – an excellent starting point for angling on the lake with boat hire available.

The Opportunities

- The building of the new bypass bridge and the implementation of the **Town Enhancement, Tourism and Mobility Plan** will better link the two towns of Killaloe and Ballina and **improve the pedestrian environment**. This will provide a better setting for the town's heritage, improve connections between the townscape and the surrounding trails into nature and can integrate light touch and integrated interpretive wayfinding
- The existing walking and canoe **trails can be better linked** including the enabling of new businesses to provide visitor services to make it easy to combine water and land trails that offer **exciting, safe and seamless adventures**
- We need to be able to assure our visitors that walking trails are linked to the town and are **continuously safe, interesting and enjoyable** – this would include finding new routes where way-marked ways currently use high speed local roads
- An **off-road link to Limerick** (navigation/walking/cycling) would connect to a key source of visitors to Lough Derg and connect Killaloe/Ballina to Ardnacrusha. The development of this iconic itinerary is supported by the Limerick County Tourism Strategy.
- The key vistas are opportunities to share with our visitors **what's in view and how they can get there** on foot or on water – while there is a car park and some interpretation and seating at the Portroe lookout it could be greatly improved as a visitor experience
- The Coillte forest at Castlelough is a key **publicly accessible part of the lakeshore** in this area and could play a bigger role in the visitor experience
- There is scope for assessing the feasibility of **new high and low adrenalin activities** in nature in locations with existing infrastructure
- There may be scope for distinctive **alternative accommodation** in line with the Fáilte Ireland Welcome Standard: glamping, pods, huts, conversion of commissioned cruise boats etc.
- There is potential for Killaloe to be a **hub for cruise hire**, subject to feasibility study
- There is a **lack of readily available information** in relation to boat hire locations, angling locations and angling information.



Killaloe/Ballina

The Vision for 2024

Killaloe/Ballina Destination Hub



Killaloe Bridge

- Fantastically exciting family-friendly adventures in nature – head **straight onto continuously safe** treks and trails leading **from the town onto the water and into the mountains east and west**
- These walks will **link and loop seamlessly with safe cycling, boat trips, easy or guided canoeing** and great **local food experiences** across a **“slow travel network”**. Come back again and again to try **new high and low adrenalin activities** in nature
- These joined-up experiences will be easy to book **on-line when the visitor is planning their journey**
- Along these trails, encounter **history up close** and the **stories in the landscape** with great interpretation that **inspires and engages**
- Lakeshore areas at **Castlelough Forest/Bay and Ballycuggeran** will offer a range of on- and off-water activities, linking in with longer distance walks linking to Killaloe/Ballina and Garrykennedy
- Explore strolling around **the town centres** and **great food and drink beside the water**
- Explore **accessible short walking loops** including locally distinctive guided heritage and food experiences within the town and into the immediate landscape
- Enjoy festivals and events that celebrate Killaloe/Ballina’s **family-friendly activities in nature** and that **connect with the wider Shannon**
- Easily accessible **angling** information and ghillies
- In the longer term, Killaloe/Ballina could be linked via a greenway to O’Briensbridge and Limerick with a great experience of the **extensive industrial heritage of Ardnacrusha** and the taming of the mighty Shannon’s power

Holy Island and Destination Villages

Journeys across the lake waters to refresh, revitalise and renew

THE PROMISE TO VISITORS

Energizing journeys that feed spirit and body – navigating lakeside villages (Mountshannon, Garrykennedy, Dromineer, Tuamgraney, Scarriff), forests and farms encircling ancient Holy Island, learning new skills, enjoying fantastic local food and cosy comforts in gently paced towns and villages



HERO PRODUCT

Explore Inis Cealtra, a 6th century holy island connected across lake waters to a necklace of historic lakeside villages and harbours

What we have already

- ✓ **Holy island in public ownership** and a feasible visitor **management plan** – enabling works/ planning authorisations will be completed by 2021
- ✓ **Five lakeside settlements** with deep historic and physical connections with the lake waters and Shannon navigation and great places to eat
- ✓ A range of **water activities**; the Lough Derg Blueway, easy canoe loops and safe paddling, AquaSplash, wild swimming at Youghal harbour, cruising, boat trips across the lake
- ✓ Many local people offering locally distinctive **creative workshops and classes** including art, traditional and contemporary craft, organic gardening, foraging
- ✓ **Restorative experiences led by locals** such as night kayaking in the full moon and yoga by the lake
- ✓ A **distinctive local retail offer** including woollens, chocolate and beeswax products
- ✓ Opportunities to engage with local food makers and engage in cookery **classes and workshops**, learn traditional skills and foraging and encounter heritage Irish fruit in the orchard of Ireland
- ✓ A wide range of **self-catering accommodation** options including cosy cottages by the lake
- ✓ **Places to eat and drink** near the water such as Brocka on the water and Larkins of Garrykennedy, traditional music at Garrykennedy
- ✓ Pike and course **fishing** year round, fishing for trout (March 15th to Sept 30th), excellent Mayfly and pike angling. Shore angling facilities available, some with universal access.
- ✓ A pilot **"Tranquillity Zone"** quiet mooring at Scarriff, where boaters access the nearby village by dinghy

The Opportunities

- The full **implementation of the Holy Island visitor management plan** – further studies are underway
- The stories of the **historic role of the harbours in food transport** can be told and brought to life with high quality food carts (see Killary harbour food cart example) and new food enterprises at lakeshore settlements
- The relatively **short time it takes to cross the lake** is little known. **More boat trip providers** would be required as the visitor economy grows
- Some of the **smaller and out of the way lakeshore public areas** which are connected by the canoe trail; Church Bay, Luska, Shehanagh, Youghal harbour, Williamstown, Mota Bay could benefit from further investment in environmentally sensitive light touch looped walks incorporating heritage features along the way, and improving walking connectivity to long distance trails
- **Creative interpretative elements** can be incorporated in the new public realm scheme planned for Scarriff
- There is no hotel open in this part of the lake – there is an opportunity to trail the **scattered accommodation** concept in Borrisokane, Mountshannon, Scarriff or Tuamgraney (see page 31)
- Opportunities to **increase the night time activities** at lakeshore villages
- Opportunities for more carefully located **tranquillity mooring zones**
- There is a lack of **readily available information** in relation to angling locations and angling information



The Vision for 2024

Holy Island and
connected
destination villages



- Connected clusters of experiences for visitors – canoe to, walk on, boat back, learn to, stretch out, eat up, sleep under the stars..... places and businesses **working together** to provide connected, relaxing and revitalising day and multi-day visitor experiences
- A seamless slow travel network, easy to plan, book and enjoy a trip that includes **boating, walking, cycling and eating your way** around this part of the lake, luggage transferred, great orientation and light-touch interpretation
- Engaging, creative and immersive ways to experience the connection between the history of **navigation, pilgrimage and productive lands**
- Enjoy the **Taste of Lough Derg/Taste the Island** initiatives focusing on the distinct producer culture on both sides of this part of the lake – you are invited to experience the place on a plate with **locally distinctive food** (organic wildflower honey, sheep's cheese, heritage Irish apples, local milk and more.....), **meeting the producers** in glorious landscapes – “shake the hand that feeds you”
- **Festivals** that have a strong cross-lake aspect and local food offer and that connect with the whole Shannon
- **Unusual and distinctive places to stay** – with great attention to detail, and great things to do in the evening; music, learn-to classes and workshops, local pubs
- Easily accessible **angling** information and ghillies
- **Linked boating and sailing/clubs** focused on existing settlements, and opportunities to **learn to sail** at a great training hub at Dromineer, enjoying **national and international sailing events**

Portumna Destination Hub

Forest bathing and wild swimming at the Port of the Oaks, the splendour and tragedy of Ireland’s lived history at the junction of historic land and water routes



THE PROMISE TO VISITORS

Locally guided insights into lived history, joined up trails through an historic town and its adjacent wetlands nature reserve, safe family cycling and paddling on the lake waters for starters or the experienced, guided fishing on the Shannon, journeys on horseback to ancient spiritual centres, journeys on land and water to nearby leafy villages; Terryglass, Lorrha, Woodford



HERO PRODUCT

Uncover Irish lived history through a connected network of woodland, water and mountain trails, extending from Portumna’s historic core to nearby villages and monastic settlements

What we have already

- ✔ **Portumna Castle, café, formal and vegetable gardens** – a significant restoration work in progress and the highest visited standalone visitor attraction around Lough Derg, it however has little online presence at the moment and poor connectivity with the main street
- ✔ **Portumna Forest Park** with its extensive walking and off-road cycling trails, bird watching and canoe trails – this is a strategically important lakeshore forest for tourism
- ✔ **The Irish Workhouse Centre** – stark insights into tragic lives, an active place organising events beyond the centre, people attending seminars, lectures and achieving qualifications in local history
- ✔ A range of **water activities**; the Lough Derg Blueway, canoe loops and safe paddling, more challenging canoe trails off the beaten track at Rossmore, wild swimming at Portumna, wilder swimming at Slaughty, boat trips linking Portumna and Terryglass
- ✔ A strategically important position at the **junction of the Shannon navigation and the long distance Beara Breifne Way** under development
- ✔ The quietest parts of the lake, the most **pristine habitats, the big clear skies** of upland raised bog and wetlands
- ✔ **Historic villages with great stories to tell** – Lorrha, Abbey, Woodford, Terryglass, traditional music at Terryglass
- ✔ **Excellent fishing infrastructure** on the Shannon, with large numbers of bream and roach at Portumna, local tackle shops and all types of anglers catered for
- ✔ A concentration of **horse-riding providers**
- ✔ Strong **local food producers** – honey, sheep’s cheese and an organic gardening centre
- ✔ High quality recreational vehicle **Aire de Service** at Portumna Castle Harbour

The Opportunities

- **Better and more direct pedestrian and cycle links** are needed between the main street, castle and the surrounding state owned forests and wetlands
- The Portumna **water recreation area** needs an upgrade (in line with site furniture detailing as carried out in Terryglass and Dromineer)
- The main street of Portumna can **be more visitor focused**, including more food outlets serving local food, centralised visitor information, Beara Breifne way trailhead, provisioning and kit for those setting off on longer water and walking journeys
- The **concentration of ecclesiastical heritage** in this area is under the radar – St. Ruadhan's 6th century Monastery and the Friary at Lorrha, the Carthusian Monastery in Abbey – there are opportunities to link with the broader ecclesiastical heritage focus of East Galway and the emerging Pilgrim Way
- A new local heritage network has convened in the northern Lough Derg Area – **the Heartlands Heritage Group** – there are opportunities for collaborations and community-led projects and guiding



- The **Oak and Iron stories** of the Slieve Aughty mountains are beginning to be told – there is much more scope to invite visitors to explore this remoter part of the lake region
- There is no hotel open in this part of the lake – there is an opportunity to trial the **scattered accommodation** concept in Portumna or Borrisokane (see page 31)
- Opportunities for **tranquillity zone** moorings



The Vision for 2024

Portumna Destination Hub



- Connected clusters of experiences for visitors, combining slow travel with the evocative historic buildings – with **Portumna destination hub stakeholders co-ordinating across their own geography** within the overall Lough Derg and Hidden Heartlands umbrella
- A **fully off-road Beara Breifne way** connecting Portumna on foot to Clonfert, Lorrha, Cloughjordan and beyond with visitor support services in place
- A seamless slow transport network – you can **horse ride, boat, canoe, walk and cycle** your way around the destination with supporting visitor services and activity friendly accommodation
- **Portumna Castle and the Irish Workhouse Centre** giving visitors real insights into the contrasts of Ireland's lived history
- Some of the most **beautiful mooring positions** on the Shannon, small berthing facilities, maintained as such, moorings that are quiet, undeveloped and off the beaten track
- A great **lakeshore Aire de Service** at Portumna – with lots to do within walking/cycling distance
- Many opportunities to meet organic food producers, **taste their produce, and learn how to garden organically yourself**
- **Fishing** at one of the best pike and coarse angling **hubs of excellence** in Europe, easily accessible angling information and ghillies



Nenagh Gateway Town

A bustling market town, steeped in heritage, with a great reputation for food and new stories to tell

THE PROMISE TO VISITORS

A great first impression of the region, great places to stay, eat and provision, a lively arts and entertainment scene, river trails that connect into the surrounding fertile landscape

Nenagh castle



HERO PRODUCT

Exploring the Historic Quarter and following the Nenagh River to Lough Derg.

What we have already

- ✓ The **historic streetscape** and range of local shops, restaurants and cafés, Arts Centre, cinema, hotels, town park, leisure centre etc.
- ✓ A feasibility study is underway on the development of **a new Historic Quarter** including the Castle, Gaol, Heritage Centre, Arts Centre, St. Mary's of the Rosary Church, St. Mary's Church of Ireland
- ✓ **Views from the top of Nenagh Castle** are extensive and include views of Lough Derg landscapes, **new Castle garden** at Nenagh Castle
- ✓ A new design is underway for the **Tourist Information Office** in the former Town Hall
- ✓ The **Genealogy centre** provides a warm welcome and a unique personalised service to visitors tracing Tipperary ancestors and enables people to stay in and get to know the places where their family once lived
- ✓ **Slí Éala** – a walk connecting Nenagh to Dromineer along the Nenagh river and the Nenagh Riverwalk
- ✓ A public realm scheme is planned for **Banba Square** streetscape, linked with the Castle, and including a performance space
- ✓ Nenagh is as a **key arrival point** off the motorway, rail and bus network and the hub of the on-road **Nenagh cycling network**
- ✓ The arts scene in Nenagh and **traditional music scene** around Puckaun
- ✓ Excellent **trout fishing** on the Nenagh river along the Slí Éala.

The Opportunities

- There is an opportunity to progress projects in Nenagh in line with Fáilte Ireland’s **Destination Town guidelines**.
- There is an opportunity to develop a new visitor focused **historic quarter** in the centre of the town to include, The Castle, The Gaol, Court House and its setting at Banba Square.
- **Nenagh 800** provides a key opportunity to raise awareness of the town and its new core role in the Lough Derg region
- A review of the Nenagh cycling network would identify any quieter on-road options or off-road sections that could be developed to **improve and broaden the appeal of the network**
- Visitor information and orientation is needed at **arrival points** on the train and bus network, the town needs **signed visitor parking and visitor car parks**, and to assess the potential for coach parking
- There is scope for **better story-telling approaches** to communicating the significance of the heritage features in the town
- Parts of the Slí Éala are currently on road, it could be upgraded to a **fully off-road trail** – with luggage forwarding services for visitors continuing towards Lough Derg
- There is no **marketing of the fishing resource** available in Nenagh.



John Hanly Woolen Mills



Nenagh castle

The Vision for 2024

Nenagh Gateway Town



McKernan's Woollen Mills

- Encounter everything the visitor needs to know about the Lough Derg region with a great **welcome and orientation on arrival** by train, coach or car
- Explore Nenagh's **Historic Quarter** which includes the key heritage buildings in the town with engaging and creative interpretation
- A **pedestrian-friendly** town centre
- **Walking Slí Éala** – the *Way of the Swan* along the Nenagh River – with engaging and creative interpretation along the way and a luggage transfer service
- **Fishing for trout** on the Nenagh River
- Explore the many places to eat and shop and pick up **local produce picnics** to fuel the onward journey
- Easily bookable clusters of experiences on-line via **accommodation provider websites**
- Enjoy festivals and events that celebrate Nenagh's **food culture and connect with the wider Shannon**
- Get in touch with your Tipperary ancestors at the **Genealogy Centre**



“
Cycle one way –
boat back?””

Building a great Slow Travel Network

Slow travel interchanges are places that sit at the junctions of existing water and land trails and the Shannon navigation. They are the places where the visitor can move from land to water, from foot to bike, boat to canoe.

To build great slow travel visitor experiences, we need to ensure that our visitors can easily move from one mode of travel to another and confidently plan looped and multi-modal journeys.

On page 50, existing investment in slow travel infrastructure is indicated in green. There are opportunities for providers to improve and expand visitor services at these interchanges; boat trips, bike hire, canoe trail services, learn-to activities, luggage transfer, guiding, ghillies, innovative food offering etc. The sites shown as A and B in the table are the most developed while the C and D sites are

“
Interconnectivity is really important –
how to get people to cross the lake?”

smaller, quieter, and more out of the way. Retaining the landscape character and ecological integrity of all sites will be crucial. In some places, there may be opportunities for environmentally sensitive light touch walking loops to nearby features or feasibility assessment for quiet lane cycling loops.

“
Boaters need to be able to get to a
shop”

The elements of the slow travel network already in place

| | | Canoe Trails | Canoe loop | "stay and play" easy paddling area | Long distance walking trail | Walking loop | Shannon navigation | Connecting boat trips | Off-road cycling | On-road way-marked cycling | Swimming with lifeguard | Wild swimming | Car park | Angling (b = boat, s = shore, rb = riverbank) |
|---|----------------------------------|--------------|------------|------------------------------------|-----------------------------|--------------|--------------------|-----------------------|------------------|----------------------------|-------------------------|---------------|----------|--|
| Killaloe Ballina destination hub | | | | | | | | | | | | | | |
| A ²⁵ | Killaloe/Ballina | | | | | | | | | | 26 | | | b |
| A | Ballycuggeran (Twomilegate) | | | | | | | | | | | | | b/s |
| B | Castlelough | | | | | | | | | | | | | b |
| D | Tinarana Bay | | | | | | | | | | | | | b |
| Holy Island and connected destination villages | | | | | | | | | | | | | | |
| A | Dromineer | | | | | | | | | | | | | b/s |
| B | Garrykennedy | | | | | | | | | | | | | b/s |
| B | Scarriff/Tuamgraney | | | | | | | | | | | | | b/s |
| A | Mountshannon | | | | | | | | | | | | | b/s |
| D | Luska | | | | | | | | | | | | | b/s |
| C | Skehanagh | | | | | | | | | | | | | b/s |
| C | Youghal Harbour | | | | | | | | | | | | | b/s |
| C | Williamstown ²⁷ | | | | | | | | | | | | | b/s |
| D | Mota Bay | | | | | | | | | | | | | b/s |
| D | Church Bay | | | | | | | | | | | | | b/s |
| Portumna destination hub | | | | | | | | | | | | | | |
| A | Portumna Marina | | | | | | | | | | | | | b/s |
| A | Portumna Water Recreation Area | | | | | | | | | | | | | b/s |
| B | Terryglass | | | | | | | | | | | | | b/s |
| C | Kilgarvan | | | | | | | | | | | | | b/s |
| C | Rossmore Quay | | | | | | | | | | | | | b/s |
| D | Old Village | | | | | | | | | | | | | |
| D | Illanaboe | | | | | | | | | | | | | |
| Nenagh gateway town | | | | | | | | | | | | | | |
| A | Sli Eala trailhead | | | | | | | | | | 28 | | | rb |
| B | Nenagh Cycling Network trailhead | | | | | | | | | | | | | |

25 Previous categories of Amenity Sites in the 2014-2017 Lough Derg Roadmap

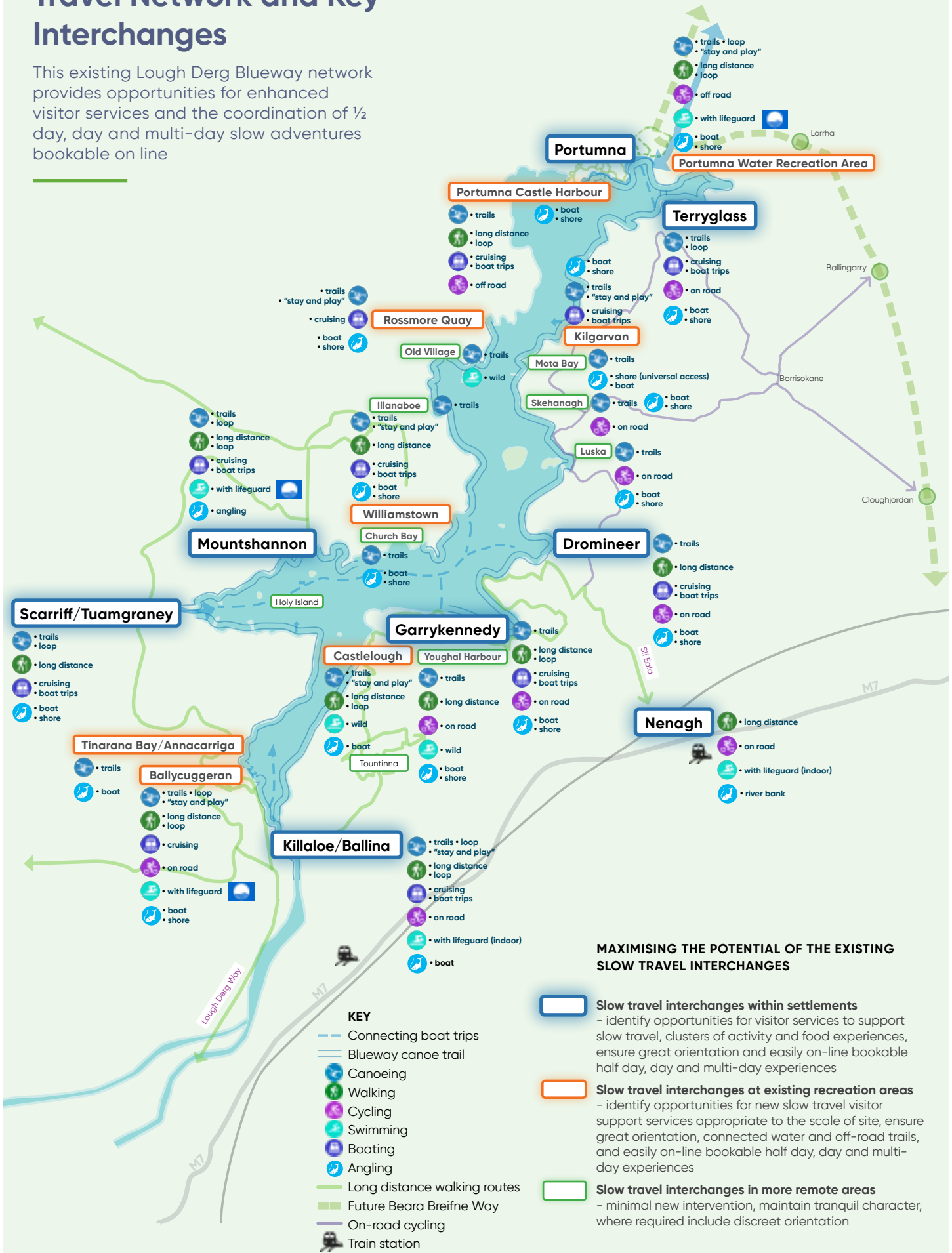
26 Outdoor swimming pool at Ballina

27 The East Clare Way travels within 1.5km of Williamstown bay which can then be reached on foot via quiet roads

28 Nenagh leisure centre

The Current Slow Travel Network and Key Interchanges

This existing Lough Derg Blueway network provides opportunities for enhanced visitor services and the coordination of ½ day, day and multi-day slow adventures bookable on line



Marketing and Communications

Co-ordinated marketing of Lough Derg has been carried out on foot of the recommendations in the Lough Derg Roadmap 2014-2017. This included; open days, networking and fam trips, maps, brochures, ezines, radio, advertorials, the discoverloughderg website, social media, Taste of Lough Derg events, industry training in social media, food story workshops, branding and procurement of marketing images.

The new approach to marketing Lough Derg takes into account its role in the Ireland's Hidden Heartlands' national experience brand, and the key emerging trends in marketing:

- The capacity of **social media's** prominence in reaching the travel market is growing
- Content creation and dissemination **by the public** across all platforms is becoming more important in driving interest in a destination
- **Mobile platforms** and communication are becoming increasingly important in engaging leisure customers **from the destination consideration stage through to the trip experience stage.**
- **Video** is becoming the new currency of destination marketing and storytelling
- Technology is enabling **faster decision-making** by customers.
- Customers increasingly expect **highly curated and customised destination content** from destination organisations
- The **brand** of a destination is becoming a more important factor in travel decisions to consumers
- The industry is moving from e-commerce through to **m(mobile)-commerce and ultimately to v(video)-commerce** in its communications and transactions with travel consumers.
- Technology is making travel products and services **more transparent** to the customer



Fáilte Ireland now has a focus on making the region more visible through the Hidden Heartlands brand. This will be done via:

- Online presence (Fáilte Ireland and Industry)
- Creating good content
- Brand toolkits
- Continuing domestic campaign

This marketing will create awareness of what Ireland's Hidden Heartlands has to offer in terms of products and experiences aligned to the 'Active in Nature' proposition.

A campaign went live in the summer of 2018 – **"Yours to Uncover"** – targeting the domestic market. The ambition was to drive mass brand awareness and to introduce the name, geography & offering.



Hidden Heartlands is very disruptive – 6 out of 10 visitors are first timers"



Concentrate on the Domestic – let them become our ambassadors"

The marketing approach "leaves a space", giving viewers room to imagine themselves in Ireland's Hidden Heartlands and with a focus on "non-manufactured experiences".

With a new product to introduce, especially based in an often over-looked area of the country, there will be a particular focus by Fáilte Ireland on showcasing the destination restaurants, pubs, and

accommodation. Social channels will be key to highlighting this pillar through:

- Top places to eat or food experiences
- Unique places to stay (from castles to tents)

Part of Destination Lough Derg's role will be to feed the latest news, openings, great things to do into Ireland's Hidden Heartlands with video, image and text content that is concise, visual, engaging and personal.

Lough Derg – content curation and communication

The messaging of businesses and attractions in the Lough Derg area is a crucial aspect of the overall marketing of the areas. **Business websites are the destination's shop window. There is no single source of truth about a destination and visitors will visit on average 38 websites before making a decision to book a visit.**²⁹

Destinations are built through their image and narratives and marketing is now about shaping the narrative rather than controlling it.

“the scale of connectivity between people has taken on entirely new dimensions through digital social platforms making word-of-mouth recommendations more important to destination branding than ever before. Today we as a DMO need to enable the relevant conversation through shareable destination moments and experiences, adding value through others to create a personal relationship with the brand essence – the localhood- of our destination.

Destination Canada,
Seizing the Winning Conditions for Canada, 2016

For this to work – **content is key**, our visitors want rich, engaging, immersive, inspirational, authentic content and they want to know what's in it for them. Content that brings the experience to life is the key to influencing travel decisions and brand perceptions will increasingly be shaped by the stories that emerge from those moments that matter.

Video is particularly effective – 3 in 5 travellers who watch online video use it to narrow down their brand, destination or activity experiences. Video plays a role right up until the last minute – 45% booked instantly after watching a video of travel activities³⁰.

Amongst digital users in the UK, 75% consume travel content, spending on average 2.4 billion minutes per month on travel content collectively – a 44% increase year on year.

Key market segments and their preferred channels of communication

Communicating with Connected Families

Connected Families tend to plan and book their holidays well in advance (3-6 months) and do most of their booking online. They tend to rely heavily on **hotel/accommodation websites, review websites, social media and personal recommendations** when deciding on where to holiday and their choice of accommodation. After their return, they try to hold on to those special holiday memories for as long as possible, by **sharing stories and photos with friends and family on social networks**.

Communicating with Footloose Socialisers

Footloose Socialisers tend to book their breaks **closer to actually taking them**, with one in three trips booked **less than a month in advance**. They do most of their **booking online**. On average their breaks tend to be for between **one to three days** and they demonstrate a stronger tendency to stay in **holiday homes/rentals** than other segments, although they are also likely to stay in hotels. They tend to rely heavily on review websites and booking agent sites (OTAs) and personal recommendations when deciding on where to holiday and their choice of accommodation. As active users of social media they share stories and pictures from their breaks online.

Communicating with Great Escapers

They are **relatively light users of social media**, but they do rely **heavily on the internet** for gathering information.

Communicating with Culturally Curious

In terms of using the internet they are more likely to rely on **'search'** rather than social media. They are also relatively heavy users of **newspapers and radio**.

29 Traveller Attribution Study, Expedia

30 Expedia 2016

07 Measuring Success

Useful Metrics



We need to measure a range of things – rebalancing tourism...

While tourism as an economic activity describes tangible, quantifiable, transactional events, a successful tourism sector depends upon much that is intangible and qualitative in nature. **Tourism depends on the qualities of place in particular.**

No matter how good an individual tourism business is, it will not thrive unless the quality of the broader environment is the best it can be. The opportunities to attract more customers, to add value and therefore generate higher spending, are all dependent on the quality of this broader environment.

It is also important to recognise the stage of development of Lough Derg as a destination. Looking at a scale from exploration to rejuvenation – the Lough Derg region is at the **Development** stage of Destination evolution. This has implications for what we want to measure, and what constitutes success. A key element will be measuring **visitor satisfaction** as the destination continues to develop, but this is not the only aspect that we need to measure.

This plan is framed within the international **VICE** model for sustainable tourism development. This model acknowledges the interaction between **Visitors**, the **Industry** that provides services, the **Community** and culture that hosts them and their collective impact on, and response to, the **Environment** where it all takes place.

To measure progress over the course of this strategy, Destination Lough Derg will therefore measure impact on:

- Visitors
- Industry
- Community, and
- Environment

A mid-term review will be carried out in 2022 to assess the progress of actions and to adapt the plan to any new circumstances

As Lough Derg develops towards the “consolidation” stage of Destination Development, we need to focus on developing tourism in a way that ensures **lasting and secure livelihoods that minimize impacts on the environment and disruption to local people**. To do this, we will integrate tourism into wider planning processes and promote goals of sustainable tourism.



Tourism is a means to an end – regional development...

Key Performance Indicators

We will listen carefully to feedback from visitors as the destination develops and track progress against the following Key Performance Indicators.

VISITOR

- Increase in overnight stays and broader spread of overnights in the lake region
- Overall visitor satisfaction and number of repeat visits
- Increased number of walkers on the Beara Breifne Way
- Increased use of the Sli Éala
- Increased numbers of walkers on the East Clare Way and Lough Derg Way
- Increase in numbers of people using more than one slow travel option to move around the destination (e.g. bike and canoe, walk and boat)
- Increased visitor use of Scarriff harbour
- Increased numbers of people using trails emanating from Portumna’s main street
- Increased number of anglers
- Increased awareness of destination wide characteristics in in-destination visitor surveys
- Increased visitor satisfaction of accessing the stories of the place
- Increased visitor satisfaction with food experiences including children’s food experiences
- High visitor satisfaction rating with ability to access information across the destination
- Length of trail network upgraded



Inis Cealtra

INDUSTRY

- Number of accommodation providers with activity friendly facilities
- Increased footfall and visitor spend in lakeside towns and villages
- Increased visitor numbers at visitor attractions
- New businesses along Beara Breifne Way
- Guided tours along Beara Breifne Way
- Increased number of Blueway businesses
- Increase in on-line bookable half-day, day and multi-day experiences for visitors
- Feedback from tourism partners about the functionality and usability of marketing tools
- User and user experience metrics in select digital channels
- Stakeholder participation in brand work with the commitment to actions that support the brand and related results
- Increased first person marketing content
- Increased visitor spend in north west part of lake
- More Lough Derg specific data available for business planning and funding applications



...regional tourism is about a lot more than one number going upward...

COMMUNITY

- Increase in direct employment
- Community groups activated and operational to support experiences
- Vacancy rates reduced in towns & villages



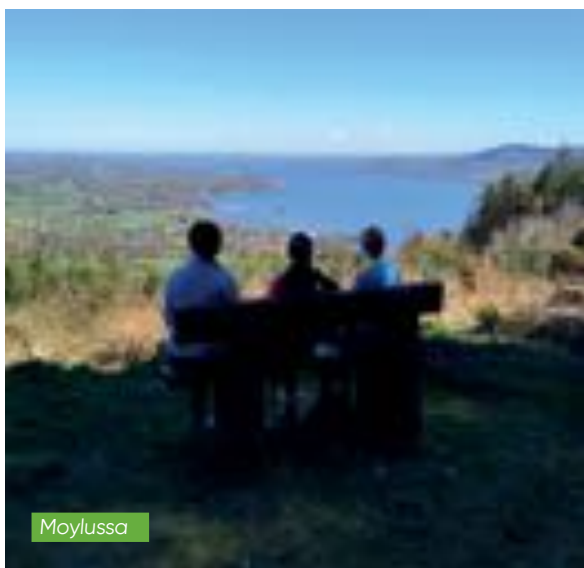
Quay Arts, Ballina

ENVIRONMENT

- Increased visitor numbers using public transport for getting to and around Lough Derg region
- Adoption of eco-environmental ethos by businesses and community groups
- Green boating (including electrification of boats and supporting infrastructure, where feasible);
- Biosecurity measures in place at key harbours/ marinas
- Number of Local Link or public transport improvements introduced
- Meeting water quality targets

We are at the “Development” stage of Destination Development

| Stage | Explanation |
|---------------|--|
| Exploration | <ul style="list-style-type: none"> ■ Small tourist numbers following irregular tourist patterns ■ No specific facilities provided for tourists |
| Involvement | <ul style="list-style-type: none"> ■ Increase in tourist numbers ■ High levels of visitor-local contact ■ Some tourist facilities beginning to be provided |
| Development | <ul style="list-style-type: none"> ■ Tourism market defined ■ Market as tourist destination |
| Consolidation | <ul style="list-style-type: none"> ■ Rate of increase in numbers will decline ■ Tourism a major part of economy ■ Efforts made to extend tourist season and market area |
| Stagnation | <ul style="list-style-type: none"> ■ Peak of visitors numbers reached ■ Capacity levels reached; social, environmental and social problems. ■ No longer fashionable destination |
| Decline | <ul style="list-style-type: none"> ■ Area unable to compete with newer attractions ■ No longer appealing for holiday goers |
| Rejuvenation | <ul style="list-style-type: none"> ■ May occur if there is a complete change in attraction. |



Moylussa

How we will gather the data

Gathering in and analysing the data to monitor progress will be a collaborative effort and include:

| | |
|--|--|
| Working with the sector to gather data | Encouraging Lough Derg businesses to feed data to the national tourism research unit and local survey initiatives by the Lough Derg Marketing Group |
| | Working with Fáilte Ireland in the Lough Derg region to ascertain real time insights into visitor numbers, visitor satisfaction, visitor movement etc. including responding to “secret shopper” insights |
| | 5-yearly visitor satisfaction surveys will be collated as part of the Shannon Tourism Masterplan initiative |
| Pooling resources to invest in a robust data collection, market intelligence and impact assessment system | Sourcing, channeling and communicating both quantitative and qualitative intelligence that will support the business decisions of the destination’s stakeholders, inform and monitor the implementation of the Visitor Experience Development Plan |
| | These systems would be developed, tested and adapted to meet research standards and would include in-destination survey, visitor questionnaires, gathering of data at point of sale etc. |

Examples of data gathering and presentation for Destination Fermanagh

DESTINATION FERMANAGH

PLACES TO EAT

Most popular types of places to eat

As a rule NI in general is not particularly well rated across most aspects of the eating out experience

Mean scores 5=Excellent

Ratings were mixed, generally around average, but highest of all regions for information on places to eat and drink out. Domestic visitors tended to rate this region better in terms of eating out than out-of-state visitors

| | |
|---|------|
| Friendly and efficient service | 4.05 |
| Menus demonstrate the use of locally sourced ingredients | 3.45 |
| Value for money | 3.52 |
| Opportunities to experience good local food and drink | 3.6 |
| Information on places to eat and drink out | 3.49 |
| Places to eat available at times of day and night that suit you | 3.63 |

VISITOR INFORMATION

Visitor Information Centres were rated very highly across Northern Ireland for all measures, especially seen as having friendly and efficient service and staff that convey a sense of pride or belief in their local area. The rating of the centre in this area was even more positive than the average seen across all regions

ACCOMMODATION

Self-catering accommodation was favoured by almost one quarter of visitors staying over in the Fermanagh Destination (higher than for most other regions) with B&Bs and hotels also popular choices in this destination

| | |
|---|------|
| Friendly and informative staff/host in accommodation | 4.24 |
| The staff/hosts in accommodation help to make this trip more enjoyable | 4.18 |
| Staff in accommodation convey a sense of pride/belief in the local area | 4.14 |
| Efficient customer service in accommodation | 4.14 |
| Information provided in accommodation on things to do/see in the local area | 4.02 |
| Value for money accommodation | 3.98 |
| Accommodation that is key part of holiday experience | 3.92 |
| Staff in accommodation told you about what was unique about area | 3.84 |
| Accommodation that is distinctive to the destination | 3.81 |

Mean scores 5=Excellent

This region performed relatively well in terms of aspects of the accommodation offering, rated amongst the top 2 or 3 across most factors, especially those involving the staff or hosts (whether it be their efficiency, friendliness, belief in their local area or provision of information about surrounding area)

Source: Tourism Northern Ireland Visitor Attitude Survey 2014 (Millward Brown)

DESTINATION FERMANAGH

KEY REASONS TO VISIT

| | |
|---|-----|
| To discover or explore somewhere new | 30% |
| Been before and wanted to return | 27% |
| To visit a number of different places in the area | 26% |
| To visit a specific attraction | 23% |
| To visit friends or relatives | 17% |
| To learn about the area and/or its people | 13% |
| A good deal on overnight accommodation | 13% |
| To visit a favourite place | 12% |
| To follow a trail around the area by car | 11% |

67% of all visitors chose this destination specifically to visit in order to enjoy the lakes, exploring the surrounding towns and villages

Taking a trip as a bit of a treat or change of scenery and wanting a good deal and nice accommodation, while not the most frequently cited, was a much greater motivation for taking a trip in Northern Ireland for visitors to this region than for any other area, for both NI residents and those from further afield

ARRIVAL AND GETTING AROUND

In terms of arriving and getting around the region, ratings for this destination were somewhat mixed. Public transport and taxi service were relatively poorly rated and while some other issues could be improved on including signs that you have arrived in the region, once there, ratings were generally amongst the highest. This is especially true in terms of signs to guide you around and to find interesting things to see and do. And fairly unusually, NI residents were more likely to rate all these aspects better than out-of-state visitors

| | |
|--|------|
| Signs that help you to find interesting/key tourist locations | 3.87 |
| Road signs that help you find your way around | 3.74 |
| Public transport availability, service and value for money | 3.41 |
| Taxi availability, service and value for money | 3.24 |
| Car touring routes which point out places along the way | 3.74 |
| A feeling of being welcomed when you arrive at destination | 4.02 |
| A sense of the place you are visiting when you arrive at the destination | 3.92 |
| Clear signs to let you know you have arrived in destination | 3.74 |

OTHER KEY DESTINATIONS ALSO VISITED

Out-of-State visitors also visited:

88% of visitors from GB and other overseas (the highest level for all regions) also visited the Republic of Ireland on the same trip and were more likely than most to visit Donegal, Galway, Sligo and Mayo

Mean scores 5=Excellent

Source: Tourism Northern Ireland Visitor Attitude Survey 2014 (Millward Brown)

ENVIRONMENTAL MANAGEMENT

The following environmental management requirements must be implemented over the course of the VEDP. These environmental management proposals are intended to secure the implementation of the recommendations identified as a result of the SEA process and the Habitats Directive Assessment.

- Wastewater, surface water drainage and drinking water infrastructure must be in place prior to development
- Contractors appointed to undertake any construction works will be expected to provide site specific method statements detailing measures taken to protect the environment during all phases of works
- Measures to protect the environment will be incorporated into design of projects to avoid adverse effects on the integrity of Natura 2000 sites. These will include, but will not be limited to, measures such as those set out in:
 - Guidelines on Protection of Fisheries During Construction Works In and Adjacent to Waters (IFI, 2016) and
 - Environmental Good Practice on Site Guide (CIRIA, 2015)
- Irrespective of planning requirements, ecological assessment should be carried out for all projects or other means of implementing the objectives of the VEDP
- The design of linkages, paths and cycleways must be prepared with the sensitivities of Natura 2000 sites and the broader ecological environment in mind. Any such proposal must consider the potential for increased disturbance of species, such as otter and breeding, roosting or foraging birds, due to any increase of human activities. Locating and designing paths and cycleways should be carried out with input from ecologists and planners to ensure there is no risk of adverse effect on Natura 2000 sites.
- In relation to discovery points, further consideration should be given to potential impact on heritage assets, sustainable transport and access, water quality and designated sites
- Lighting of buildings and features around Lough Derg and along watercourses will be avoided wherever possible. If lighting is required within the riparian zone or along the banks of a watercourse it should be designed in consultation with an appropriately qualified ecologist
- It must also be noted that the appropriate assessment at plan level does not exempt projects or plans arising from the plan from the assessment requirements of Article 6(3) at a later stage, when much more details of potential impacts and effects are known. In other words, projects or plans that result from the Visitor Plan are also required to undergo Article 6 assessment before they can proceed or be permitted. The relevant competent authority, such as Tipperary, Galway, Clare County Councils as well as An Bord Pleanála or another designated public authority, will be responsible for ensuring that projects or plans that result from the Visitor Plan are also required to undergo Article 6 assessment before they can be permitted or proceed.
- Biosecurity measures for inland waterways, prepared by organisations such as Waterways Ireland to prevent the inadvertent disruption of the Lough Derg and the Shannon's natural ecosystems, would be implemented across the VEDP area
- Interpretation text should be developed to reflect environmental sensitivities and specific issues around wildlife disturbance including noise, littering and contamination of habitats. In addition, appropriate wayfinding should be used to guide visitors towards designated routes to create awareness and appreciation of areas of significant environmental quality and/or architectural significance, whilst mitigating the disturbance, erosion, and damage of same
- Event management plans should be prepared to manage the environmental impact of popular festivals, with an attendance of under 5,000 people. This can be facilitated through the assistance and support of Destination Lough Derg and input from relevant statutory authorities such as the NPWS in relation to 'Notifiable Actions'
- Seek to ensure that major new development incorporates a zero carbon approach
- Ensure that major new development incorporates appropriate traffic management measures and measures to enhance sustainable travel.

08 Action Plan Overview

A detailed action plan is set out in the accompanying Lough Derg Destination Action Plan 2020–2024 – an overview is given here³¹

| ACTION AREA | OBJECTIVES | |
|--|------------|--|
| ACTION AREA 1 Destination Management | 1.1 | Resource the Partnership – Organise the stakeholder group and resource the tourism role at Lough Derg. |
| | 1.2 | Consolidate the Approach – Align with the Tourism Masterplan for the Shannon and Ireland’s Hidden Heartlands (IHH). |
| | 1.3 | Coordinate Lake Wide Initiatives – that deliver a high quality visitor experience. |
| | 1.4 | Measure Progress – Measure performance and remain responsive to emerging evidence on visitor behaviour and preferences. |
| ACTION AREA 2 Destination Innovation | 2.1 | Provide a Great Visitor Welcome – Ensuring a great welcome for visitors across the whole destination. |
| | 2.2 | Enable a Choice of Accommodation – Support the development of a variety of unique accommodation options to meet visitor needs. |
| | 2.3 | Facilitate Slow Travel – Make it easy for our visitors to explore Lough Derg sustainably by developing services along the slow travel network. |
| | 2.4 | Offer Great Food – Enhance the visitor experience with high quality, locally produced food on and around Lough Derg. |
| ACTION AREA 3 The Visitor Experience | 3.1 | Killaloe/Ballina Destination Hub – A natural playground with fresh perspectives on this iconic Shannon crossing; the perfect base to get active in nature |
| | 3.2 | Inis Cealtra (Holy Island) and Connected Destination Villages – Explore Inis Cealtra, a 6th century holy island connected across lake waters to a necklace of historic lakeside villages and harbours. |
| | 3.3 | Portumna Destination Hub – Uncover Irish history through a connected network of woodland, water and mountain trails, extending from Portumna’s historic core to nearby villages and monastic settlements. |
| | 3.4 | Nenagh Gateway Town – A bustling market town steeped in heritage, with a great reputation for food, compelling stories and a great welcome to the Lough Derg region at Nenagh’s Historic Quarter. |
| ACTION AREA 4 Destination Marketing | 4.1 | Develop a Distinctive Digital presence – Update and maintain a distinctive Lough Derg digital presence. |
| | 4.2 | Ensure Cohesive Communication – Work with national and local bodies to coordinate communication and ensure cohesive messaging. |
| | 4.3 | Partnership – Support marketing actions of tourism businesses. |
| | 4.4 | Be Market Ready – Work together to create and promote market-ready offers, packages and itineraries. |

³¹ Note that the response to the 2020 Covid-19 crisis included formation of Lough Derg Destination Recovery Task Forces who have devised rapid implementation Action Plans separate to those set out in this VEDP

APPENDICES

A A detailed analysis of the domestic Connected Families market needs and wants

APPENDIX A

A detailed analysis of the domestic Connected Families market needs and wants

| TOTAL NUMBER OF FAMILIES IN IRELAND – 416,000 | MAKE UP AND VARIATION | “NEED TO HAVE” |
|---|---|---|
| AVERAGE FAMILY | 78% of Irish families are Mum Dad and 2+ children: 40% = 2 children 25% = 3 children 13% = more than 3 children | <ul style="list-style-type: none"> Value for money Weather independent activities – pools, play centres, cinema Varied activities such as water activities, farms, heritage sites/centres, cycling, picnics, playgrounds Childcare/babysitting Good value food & entertainment options Family-friendly language |
| | PRE-SCHOOL FAMILY | |
| | Mum, Dad and 1 or 2 pre-school children | <ul style="list-style-type: none"> Off peak discounts Safe & accessible facilities Adult R & R choices Childcare/club options Buggy-friendly ‘soft’ activities Weather independent activities – pools, play centres Good (adult) food |
| | BLENDED FAMILY | |
| | (step) Mum, (step) Dad, 2-4 + children of broadly varied ages | <ul style="list-style-type: none"> Non age-specific ‘family’ activities Varied food options |
| BEANPOLE FAMILY | 22% of Irish families are Mum, Dad and 1 child | <ul style="list-style-type: none"> Age-appropriate activities Social activities/clubs Good food |
| OTHER FAMILY SUBGROUPS & GROUPINGS | | |
| MULTIGENERATION FAMILY | Various family groups often called vertical family when including grandparent and horizontal when including siblings and cousins | <p>Good value/group discounts</p> <ul style="list-style-type: none"> Non age-specific activities Adult space – R & R |
| ONE PARENT | 98,000 families are lone parent families with at least 2 children. A third are either separated, divorced or widowed. These families tends to holiday with other families and/or relatives | <ul style="list-style-type: none"> Adjoining/large accommodation |
| HOME-FROM HOME FAMILY | Average family visiting relations for long periods | <ul style="list-style-type: none"> Good value accommodation (close to relations) Lots of activity options |

| "NICE TO HAVE" | KEY BARRIERS | PROPOSITION |
|--|---|---|
| <ul style="list-style-type: none"> ■ Adult R & R options ■ Varied & 'healthy' children's menus ■ Club options ■ Close/access to shopping, festivals, day trips, water activities/sports ■ Media entertainment for kids ■ On-line booking | <ul style="list-style-type: none"> ■ Cost and the perception that there won't be enough/ suitable things to do. ■ The weather is also a barrier, along with lack of easily accessible on-line information | <ul style="list-style-type: none"> ■ Quality family time at a reasonable price ■ "Value for time" |
| <ul style="list-style-type: none"> ■ Baby/toddler equipment – potty, bath, buggy - so they don't have to bring it ■ Adjoining rooms ■ Activities: water, petting farms, playgrounds | <p>Weather and perception of activity options</p> | <p>Fun and relaxing family time</p> |
| <ul style="list-style-type: none"> ■ Older children activities/ facilities | <p>Cost and not enough to do</p> | <p>Quality family time at a reasonable price</p> |
| <ul style="list-style-type: none"> ■ Health/wellness options ■ Environmental credentials | | |
| <p>Adult and child food/ dining options</p> | <ul style="list-style-type: none"> ■ Cost ■ Narrow age band activities | <p>Memorable family time at a reasonable price</p> |
| | <p>Need a reason to stay longer with relatives</p> | |



Lough Derg

.....
Visitor Experience Development Plan
.....

2020 - 2024