

Strategic Tourism Marketing, Experience & Destination Development Plan 2016-2021



- Final Report -

prepared for

Tipperary County Council

by

CHL Consulting Company Ltd.

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1. INTRODUCTION

This Strategic Tourism Marketing, Experience & Destination Development Plan (the Plan) has been prepared for Tipperary County Council by CHL Consulting in the context of change and opportunity. North and South Tipperary County Councils merged in 2014 and, with the expiry of the South Tipperary Tourism Review & Development Plan as well as the North Tipperary Tourism Plan & Action Plan, the Council is now approaching 'a unified' all-county tourism Plan for all Tipperary for the first time.

The Plan has been commissioned by Tipperary County Council and Tipperary Tourism Company with specific actions to be managed through the newly appointed Tipperary Tourism Company. A steering group with representatives from Tipperary County Council and Tipperary Tourism Company was set up to engage with the study team throughout the preparation of the Plan.

The overall objective has been to create

A Plan to galvanise and enable growth for Tipperary as a unique tourism destination within the island of Ireland experience

In meeting that objective the Plan's aims are:

- to develop and promote the tourism experiences in order to improve Tipperary's performance within the national framework;
- to encourage industry sustainability and growth through the improvement and development of product offering;
- to build the capacity of tourism providers and to extend visitor length of stay;
- to identify and build synergies between different tourism product offerings in order to deliver a top quality visitor experience.

The report reviews the present position of Tipperary's tourism product, analysis of the potential of the County and puts forward destination and product development propositions with an action plan and toolkit. We are pleased to present our findings, propositions and actions which we believe will meet the stated objectives.

CHL conducted its work on the Plan between late October 2015 and March 2016. During this period, the team implemented an extensive programme of research, interviews, field visits, workshops, public consultations, and analysis. The work was guided by a strongly consultative approach which sought to ensure that a comprehensive range of interest, opinions and sources of information were taken fully into account. The key objectives were to ensure that the team developed a thorough understanding of Tipperary's tourism industry, and that all relevant parties had an opportunity to make an input into the development plan process.

Tourism trade workshops were conducted in mid-December 2015, in Nenagh and Clonmel respectively. CHL would like to thank the trade who gave of their time to attend the workshops and contribute to the proposition development.

During the same period, CHL conducted public consultations, again in Nenagh and Clonmel respectively. These sessions offered a uniquely Tipperary perspective on opportunities and challenges for tourism in the County; CHL would like to thank those who attended the public consultation providing valuable insights to the team for the basis of their work.

Monthly update meetings took place with the steering group, Tipperary County Council and Tipperary Tourism Company at which the team presented findings to date, draft framework for the Plan and the draft Plan prior to final sign off. A slide presentation outlining the thrust of the Plan will be presented to Tipperary County Council members on May 9th.

The consultant team were afforded significant time from Tipperary County Council tourism office to enable and support aspects of the work programme for which we would like to record our sincere gratitude.

2. CONTEXT FOR THE PLAN

This chapter considers the wider market policy context and market environment within which informs the development of a tourism Plan for Tipperary.

2.1 National Tourism Policy

In March 2015, the government published a new tourism Plan entitled *People Place and Policy – Growing Tourism to 2025*. The overall goals of this Plan were set out as follows:

- By 2025, revenue from overseas visitors, excluding carrier receipts, will increase to €5 billion in real terms (i.e. excluding the effects of inflation).
- Employment in the tourism sector will be 250,000 by 2025, compared with around 200,000 at present.
- There will be 10 million visits to Ireland annually by 2025.

In expanding on these goals later in the document, the government underlined a clear focus on the importance of overseas tourism, yet sought to establish a balance between overseas and domestic tourism by stating that:

The Government's primary objective in tourism is to maximise the services export revenue of the sector, and therefore, this policy statement is centred on Ireland achieving its full potential as a destination for overseas tourism. However, it is recognised that the domestic tourism market underpins the range of visitor accommodation and services that provide competitive advantage to Ireland in the international market and many of the measures contained in this Statement will similarly benefit the domestic tourism sector.

It is notable that the document highlights the “*visitor accommodation and services that provide competitive advantage to Ireland*” and acknowledges that many of these service providers are in fact underpinned by a strong domestic market. Without this domestic market it is unlikely that some operators would survive and might not therefore be available to provide services and activities to overseas visitors when they arrive in Ireland.

The new policy also emphasises the benefits that accrue when local authorities and local communities work together. It states (p 61) that *“local authorities will be encouraged to support communities in tourism development”*. The tourism and business community in Tipperary has played a leading role in the development of the county to date, and is well positioned to serve as an engine of economic development into the future.

The Tipperary Local Economic & Community Plan aims to fuse together economic and community activities to ensure community participation and gain. The LECP is germane to tourism in Tipperary as it sets out a requirement to draw up a tourism destination strategy which has informed the preparation of this Plan. The LECP recognises the significant potential of Lough Derg and the Munster Vales in meeting the destination preference of the international market as set out in Section 2.3, in line with Fáilte Ireland research. This is an advantageous point to begin from in bringing the hard work of a range of Council expertise in supporting the development of tourism infrastructure in the County.

While tourism has been a priority for some time for Tipperary, the approach has been influenced by the administrative boundaries of a North and South Council. There is significant opportunity for Tipperary supported by the integration of North and South under one administration enabling a shared vision of the County. This fresh dynamic is also reflected in the collaborative inter-county work that's taken place by the Lough Derg Marketing Group and the more recently convened Munster Vales Working Group; both of which have resulted in strategies and marketing plans to engender a greater awareness of the excellent experiences to be shared in these areas.

2.2 The Visitor Experience – and a Sense of Place

In recent years, considerable research has been carried out in Ireland and overseas to better understand what it is that visitors are looking for when they consider a holiday break in Ireland. From this research it is clear that, with some exceptions, tourists generally do not consider visiting a destination because of a particular hotel or a particular coach/tour operator. The new tourism policy document summed this up as follows:

‘Tourists do not choose between competing accommodation operators, tour operators, or transport providers, in the first instance. Customers choose a destination. The quality of the tourism offering, including natural scenery, culture, and visitor attractions and events,

are all contributors to the overall attractiveness of the destination. Therefore, the effective combination of Ireland's people and place are key to our tourism success. (p14).'

The reference to "Ireland's people and place" is particularly noteworthy, and is at the heart of contemporary tourism planning in Ireland. We are now clear that visitors to Ireland are looking for unique Irish experiences. In this regard, the word "experience" is deliberately used. Increasingly, tourists - as consumers - consider accommodation as a commodity. While there are exceptions in the form of destination resorts, hotel accommodation is considered to be much the same everywhere and will not serve to differentiate one destination from another. It is seldom exceptional and therefore will seldom serve as a differentiator in the minds of consumers. If it does not serve as a differentiator, then the destination will not "stand out" in the mind of the consumer.

Experiences on the other hand are considered by tourists to be unique and authentic activities that they can only encounter and engage in at a particular location, and that are strongly connected to the people and the sense of place at that location. As one national tourism board put it, *"a tourism product is what you buy, but a tourism experience is what you remember"*¹.

2.3 Tourist Profile and Market Segmentation

Prompted by a decline in visitor numbers to Ireland during the recent economic downturn, a significant programme of research was undertaken by tourism stakeholders to identify those consumers - both at home and abroad - who might be interested in the tourism experience Ireland can offer. This research underlined the need for Irish tourism to take a more narrow targeted approach to marketing, rather than a very broad and undifferentiated one. In other words, the prevailing Plan now is to sell to those consumers who are known to be interested in Ireland, rather than attempting to sell to everybody (on the assumption that if the tourism industry is busy "selling to everybody" then it might be actually selling to nobody).

This Plan is referred to as "market segmentation", and the approach therefore is to target specific and narrower segments of the overall market, rather than mass marketing to an undifferentiated audience. For example in Britain, out of a total population of 60 million people, a particular segment of around 5 million consumers (who are known to be "warm to the idea of a holiday experience in Ireland) is now the focus of tourism marketing

¹ Canadian Tourism Board

campaigns. In addition, specific types of consumers (with specific tourism interests) have been identified in each segment.

Fáilte Ireland describes three types of consumers who are a particular focus for Irish tourism marketing in our principal source markets (Britain, USA, France and Germany):

- **“Culturally Curious”:** Travellers in the over 45 age group taking a holiday with their partner. They are out to broaden their minds and expand their experience by exploring new landscapes, history and culture.
- **“Great Escapers”:** These tend to be younger and are specifically interested in rural holidays. Great Escapers are on holiday to take time out, and experience nature at close range.
- **“Social Energisers”:** Younger visitors who like to holiday in groups or as couples. Friends or colleagues looking for an exciting trip to a new and vibrant destination.²

The research indicates that the *Culturally Curious* are not interested in a superficial engagement. They expect a “heritage experience” that is entertaining, engaging (active, not passive), and immersive in that they wish to find out and experience as much as they can during their visit. The Great Escapers are typically at the family formation stage and are looking for time out to reconnect with family and friends. The Social Energisers are essentially interested in an exclusively urban short break. Given its tourism asset base, Tipperary is well positioned to cater for the interests of the first two of these consumer cohorts.

In addition to overseas markets, similar research has been undertaken in the domestic market. There now exists a more developed understanding of the domestic tourism consumer and what it is they expect from a domestic leisure break. The domestic market has also been segmented and specific types of consumer identified. These are:

- **“Connected Families”:** These families are looking for opportunities to spend time together through shared experiences. This segment accounts for 23% of the domestic market.

² People, Place and Policy – Growing Tourism to 2025 (p17)

- **“Footloose Socialisers”**: These are young travellers keen to spend time socialising with groups of friends. They account for 15% of the domestic market.
- **“Indulgent Romantics”**: Couples who want to spend time reconnecting and are particularly interested in the more luxurious end of the market. This segment accounts for 14% of domestic market.

Each segment has its own preferences not only in terms of travel but also in terms of media usage and how they plan holidays. This information will help shape marketing activities for the relevant segments at a later stage. However, not all these segments are a good match for what Tipperary as a destination has to offer. For example, the ‘Social Energiser’ overseas segment is primarily drawn to urban locations while the Irish ‘Indulgent Romantics’ are primarily drawn to spa-type experiences. Taking Tipperary’s asset base into consideration, the most promising market segments to target are the Culturally Curious and Social Energisers among overseas tourists, and Connected Families in the domestic market.

2.4 Things to See and Do

It has been observed that, as an industry, tourism is comprised of two distinct components - that is “day time” tourism (10.00 to 19.00 hours) and “evening tourism” (19.00 to 10.00 hours). Ireland has traditionally had particular strengths in “evening tourism” which is dominated by the hospitality sector, and by the accommodation, food and drink sub-sectors in particular. Given traditional organisational and trade association structures in Irish tourism, these sub-sectors have typically been well organised and have possessed the resources to protect and promote their particular business interests.

By contrast, those involved in “day time” tourism, typically the smaller businesses providing access to things to see and do, have tended to be less well organised in terms of formal trade associations, and so perhaps have lacked a degree of influence in the evolution of tourism policy. Yet doing things, seeing things, and (increasingly) getting involved and active in things (experiences), is exactly why visitors come to Ireland. These are the factors that convert a vague interest in Ireland into a firm booking. These are also the factors that allow Ireland to “stand out” and distinguish itself in the noisy international tourism market place - these are the things that only Ireland can uniquely provide to visitors.

To an increasing degree, conventional accommodation cannot serve as a differentiating factor prompting consumers to choose one destination over another. This is why in *People, Place, and Policy – Growing Tourism to 2025*, reference is made to ““visitor services that provide competitive advantage to Ireland”. As the elements of the “evening time” tourism economy become more homogenised and commoditised, the potentially stronger and differentiating elements of the “day time” tourism economy come to the fore and represent a more compelling source of sustainable competitive advantage.

To an increasing extent, this focus on “day time” tourism is where Tipperary must also look to find its unique source of tourism competitive advantage.

These introductory points are elaborated in the following sections of this report.

3. MARKET ANALYSIS

No business or tourism destination operates in isolation from the influences of the world, whether they be political, economic, social, technological, environmental or legal. All of these - and more - influence the manner in which a destination can offer itself to potential customers. They also influence the way in which those customers will view the destination as well as how they interact with it and the likelihood of their spending time there.

While some relevant factors of the broader context have been mentioned in Section 1, the most relevant area to explore in supporting Tipperary tourism's aims, is the 'sweet spot' between supply and demand. In other words, what do consumers want, what does Tipperary have and what are the areas where these two best fit together. These are the main areas of consideration in this Section and they are presented along with relevant feedback from consultees. The implications drawn from this analysis are presented as Conclusions in Section 3.5.

3.1 Market Demand Review

3.1.1 National Tourism Trends

Tourism in Ireland continues to grow substantially, making ground after several years of contraction during the economic recession - a period that is still influencing the industry in the county, as we will see in Section 3.3. Domestic tourism has been growing at a rate of 3% per annum but overseas tourism to Ireland - strategically important due to the additional revenue it brings into the economy - grew by almost 14% in 2015, with strong growth from all main markets. This means that the market environment in which the Plan is being launched is a positive one.

Table 3.1: Overseas Tourism to Ireland 2012-2015

	(000's)				
	2012	2013	2014	2015	% Change '15/'14
Britain	2,774	2,929	3,164	3,547	12.1
North America	1,017	1,158	1,329	1,514	14.0
USA	904	1,036	1,169	1,323	13.2
Canada	113	123	160	191	19.6
Mainland Europe	2,347	2,463	2,638	3,043	15.4
France	396	434	456	505	10.8
Germany	448	483	557	629	12.9
Italy	252	234	258	321	24.7
Spain	253	263	291	343	18.0
Belgium/Netherlands/Luxembourg	237	265	275	326	18.7
Norway/Sweden/Finland/Denmark	191	210	200	234	16.8
All Other Europe	570	575	602	685	13.9
Other Areas	379	436	474	539	13.7
Australia/New Zealand/Other Oceania	156	188	190	208	9.3
Other areas	223	248	284	331	16.6
Total Overseas	6,518	6,986	7,604	8,643	13.7

Source: Fáilte Ireland and CSO – Overseas Travel 27th January 2016

Note: The figures include both staying and same day visits to Ireland and do not include any estimates for those who travel via Northern Ireland.

While there were well over 8.5 million visitors to the country in 2015, less than half came to Ireland primarily on holiday (48% in 2014) and a third were visiting friends/relatives. In addition, they were, generally speaking, not the most active visitors, as can be seen from Table 3.2.

Table 3.2: Overseas Tourists' Participation in Activities

Attraction	Overseas Visitors	Domestic Holidaymakers
	%	%
Visit Cultural/Historical Site	52	24*
Hiking/Walking	17	24
Water-based Activities	n.a.	22
Cycling	4	8
Golfing	2	8
Fishing	2	4
Equestrian	1	2

* Visits to houses/castles Source: Fáilte Ireland

3.1.2 Tourism Demand in Tipperary

Tipperary attracts over 300,000 visitors annually, with slightly more overseas visitors than domestic. Within the county itself, south Tipperary continues to attract considerably more tourists than the northern part of the county (134,000 overseas tourists in the south compared with 56,000 in the north in 2014) - due, no doubt, to the location there of The Rock of Cashel.

Table 3.3: Tourism in Tipperary, (000's)

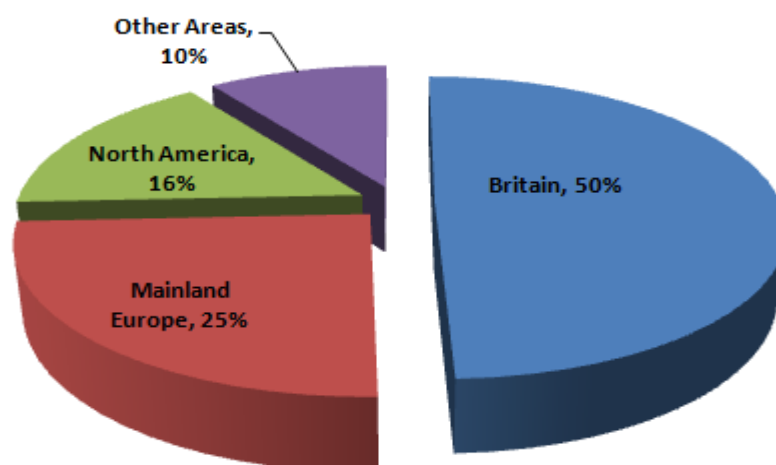
County	Overseas (000's)	Domestic (000's)	Total (000's)	Ratio of Overseas Visitors to Domestic
Tipperary	190	142	332	1.3
Waterford	255	255	510	1.0
Kilkenny	249	166	415	1.5
Galway	1,235	774	2,009	1.6
Laois/Offaly	101	141	242	0.7
Clare	561	321	882	1.7
Limerick	494	209	703	2.4

Source: Fáilte Ireland

Tipperary's neighbouring counties include several well-established tourism destinations and, as a result, their volume of tourism is substantially greater. It is interesting to note that the ratio of overseas to domestic is not the same for each county - the domestic market is proportionately more important for Tipperary and Kilkenny than it is for Limerick and Clare. This suggests both the need to pay particular attention to the domestic market while also indicating considerable room for growth in overseas tourism.

The source of overseas business is also not identical for each county. Table 3.1 provided an overview of the breakdown of overseas visitors to Ireland and Chart 3.1 gives a summary of this same information specifically for Tipperary. Of interest are the facts that Britain accounts for a higher proportion of visitors to Tipperary than for the country as a whole, (50% versus 41%), while Mainland Europe is proportionately less important (25% versus 35%).

Chart 3.1: Source of Overseas Tourists to Tipperary



Other key characteristics of tourism in Tipperary include the following.

- A seasonal market: 56% of overseas holidaymakers visit during the three month period June-August.
- Predominantly users of hotels/guesthouses (almost 60% of nights spent in this form of accommodation)
- A high proportion of visitors to the region also visit Dublin & the South West.
- Half are travelling as part of a couple.
- Over two thirds are on their first visit to Ireland.
- 43% are aged 45-64.
- Well over two-thirds are travelling independently.

3.2 Tipperary's Competitive Positioning

3.2.1 Performance Measurement

The key determinants of tourism performance are visitor volume and spend. Tourism is a commercial industry and it is therefore properly measured on the basis of the level of economic activity it generates. In simple terms, this is the product of visitor numbers and spend profile. This in turn determines the number of jobs the industry creates, and allows us understand its impact in sustaining employment and communities around the county. In this regard, Fáilte Ireland notes that every €1 million of tourist expenditure helps to support 34 tourism jobs, and that every 55 international tourists help support one tourism job. Therefore in the commentary below, tourism performance in Tipperary is considered against the key criteria of visitor numbers and spend.

3.2.2 Overseas Visitors

Table 3.4 below presents some data on Tipperary's tourism performance within the context of all counties in Ireland. In this Table, both Dublin and Cork are presented separately, because both have an international airport and serve as significant arrival gateways into Ireland. Their tourism performance at county level is unduly skewed by this arrival activity (some 85% of all international visitors to Ireland arrive through Dublin Airport). In comparative tourism terms, Cork, but most especially Dublin, are statistical outliers. Consequently the table presents tourism data for Tipperary within the context of a 24 member "comparator set".




This is consistent with tourism practice elsewhere. For example, tourism performance in Dublin is not measured against global cities such as London, Paris, or Berlin. Rather, Dublin is considered to exist within a comparator set that includes cities such as Copenhagen, Vienna, Amsterdam, Barcelona, etc.

Further evidence of Dublin's unique tourism performance is presented in Table 3.5 which shows that 13 of the top 21 fee-charging attractions nationally, and 12 of the top 21 free attractions, are located in the Greater Dublin Area (Dublin plus the three contiguous counties of Meath, Kildare, and Wicklow). This performance is significantly influenced by the fact that Dublin is the capital city and that because most visitors arrive there, and they are likely to stay over for a day or two. Other counties have to work harder to attract visitor attention and visitor spend.

An immediately notable point about the data in Table 3.4 is the clustering pattern evident between inland and coastal counties. Coastal counties dominate in the upper half of the distribution while inland counties tend to dominate in the bottom half. This suggests that, on balance, visitors to Ireland have a certain bias for a coastal tourism experience (at least for some part of their trip). This observation is pertinent to an understanding of Tipperary's tourism performance.

For example, in terms of overseas visitor numbers in 2014, Tipperary is ranked joint 11th out of the full set of 24 counties. The only inland county positioned higher than Tipperary is Kilkenny. Given that Tipperary is currently performing at or near the top of all inland counties, a growth target for the county in the context of this five-year tourism Plan should move into the top third of the table (top eight performers) and deliver a performance similar to that produced by the top coastal counties.

Table 3.4: County Distribution of Overseas Visitors by Volume and Value in 2014

County	Attribute	Volume (000)	County	Attribute	Value (€m)
Dublin	Coastal	4,119	Dublin	Coastal	1,378
					
Cork	Coastal	1,542	Cork	Coastal	550
					
1. Galway	Coastal	1,235	1. Galway	Coastal	350
2. Kerry	Coastal	1,040	2. Kerry	Coastal	228
3. Clare	Coastal	561	3. Limerick	Coastal	169
4. Limerick	Coastal	494	4. Clare	Coastal	128
5. Mayo	Coastal	259	5. Wicklow	Coastal	75
6. Waterford	Coastal	255	6. Kildare	Inland	70
7. Donegal	Coastal	252	7. Mayo	Coastal	68
8. Kilkenny	Inland	249	8. Donegal	Coastal	67
9. Wexford	Coastal	240	9. Tipperary	Inland	64
10. Wicklow	Coastal	212	10. Wexford	Inland	54
11. Tipperary	Inland	190	11. Waterford	Coastal	52
12. Kildare	Inland	183	12. Sligo	Coastal	43
13. Sligo	Coastal	159	13. Louth	Coastal	39
14. Meath	Coastal	115	14. Westmeath	Inland	32
15. Cavan	Inland	126	15. Meath	Coastal	38
16. Louth	Coastal	101	16. Cavan	Inland	41
17. Westmeath	Inland	96	17. Carlow	Inland	30
18. Carlow	Inland	63	18. Kilkenny	Inland	33
19. Monaghan	Inland	57	19. Laois	Inland	19
20. Laois	Inland	53	20. Monaghan	Inland	18
21. Leitrim	Coastal	51	21. Offaly	Inland	14
22. Offaly	Inland	48	22. Leitrim	Coastal	14
23. Roscommon	Inland	44	23. Roscommon	Inland	16
24. Longford	Inland	22	24. Longford	Inland	7

Source: Fáilte Ireland – Regional Tourism Performance in 2014

In terms of overseas tourism revenue, Tipperary also put in a strong performance in 2014. With earnings of €64 million, it is ranked 9th out of the 24 member comparator set. Of the inland counties, only Kildare is ranked above it, and it is likely that proximity to Dublin has influenced Kildare's performance. A growth target to move into the top-third of the set should be a realistic ambition within the timeframe of this plan.

Table 3.5: Attendance at popular visitor attractions in Ireland, 2014

Top Fee-Charging Attractions			Top Free Attractions		
Attraction	County	Visitors	Attraction	County	Visitors
Guinness Storehouse	Dublin	1,269,371	The National Gallery	Dublin	593,183
Cliffs of Moher	Clare	1,080,501	National Botanic Gardens	Dublin	541,946
Dublin Zoo	Dublin	1,076,876	Doneraile Wildlife Park	Cork	460,000
NAC	Dublin	931,074	NMI – Kildare Street	Dublin	447,137
Book of Kells	Dublin	650,476	Science Gallery at TCD	Dublin	406,982
St Patrick's Cathedral	Dublin	457,277	Farmleigh	Dublin	402,773
Tayto Park	Meath	450,000	Newbridge Silverware	Kildare	350,000
Fota Wildlife Park	Cork	438,000	IMMA	Dublin	306,662
Blarney Castle	Cork	390,000	Chester Beatty Library	Dublin	304,000
Rock of Cashel	Tipperary	372,503	NMI Natural History	Dublin	300,272
No 29 Georgian House Museum	Dublin	370,000	The National Library	Dublin	270,394
Kilmainham Gaol	Dublin	328,886	NMI – Collins Barracks	Dublin	243,172
Bunratty Castle	Clare	294,339	Holy Cross Abbey	Tipperary	200,000
Castletown House	Kildare	285,410	Connemara National Park	Galway	169,960
Jameson Distillery	Dublin	270,038	The Hugh Lane Gallery	Dublin	160,000
Kilkenny Castle	Kilkenny	259,250	Galway City Museum	Galway	153,000
Powerscourt House	Wicklow	232,605	Nicholas Mosse Pottery	Kilkenny	120,000
Dublin Castle	Dublin	217,758	Sliabh Liag Cliffs	Donegal	120,000
Christ Church Cathedral	Dublin	173,265	NMI - Turlough Park	Mayo	109,000
Glenveagh National Park	Donegal	150,691	Malin Head Viewing Point	Donegal	105,000
Clonmacnoise	Offaly	149,472	The Model	Sligo	104,000

In terms of tourism metrics, revenue is a more significant measure of performance than visitor numbers. Although the two metrics tend to correlate relatively well, the revenue metric represents real spend in Tipperary as opposed to the volume of people that visited the county. The latter measure is often a more prominent focus of attention, although it is evident that simply growing numbers may not necessarily grow spend. Tipperary's earnings performance is therefore encouraging.

The data in Table 3.4 suggest that Tipperary has a functioning tourism asset base, that in comparative terms it is currently performing relatively well, and that this platform, combined with a strengthened sales capability, should allow the county to move into the top third of the comparator set over the five-year timeframe of this plan.

3.2.3 Domestic

Tipperary's performance in the domestic market is presented in Table 3.6 below. The data are not strictly comparable because of the clustering of a number of counties. In terms of inland/coastal preferences, the domestic consumer market appears to behave very much the same as the overseas one. Tipperary does not perform as well in the domestic market generating 142,000 visitors, €26 million in revenue, and placed 16th within a comparator set of 18 counties/clusters. This market performance is analysed in greater detail in subsequent sections of this report. It should also be noted that the combination of individual counties and county clusters limits the extent to which these data can be meaningfully interpreted.



Nevertheless, given that the top eight counties (by value €m) in the comparator set are all coastal ones, it would be something of a stretch target over the timeframe of this plan, if Tipperary was to move into the top half of this distribution and sit at 9th place. Based on the current ordering of the distribution represented in Table 3.6 overleaf, such a performance - in current and relative terms – would require an increase in earnings of the order of 75% over the five year period of the plan. This matter is further considered later in this report.

3.2.4 Summary Observation

Relative to other counties, Tipperary is performing reasonably well in the international tourism market. This of itself lends credibility to the belief that the county could further improve its tourism performance over the next five year period. It demonstrably has a functioning tourism asset base, which can be leveraged for future growth.

The county is performing relatively poorly in the domestic market. This is significant given that the domestic market knows and understands Tipperary. Improved market positioning, and a stronger and more coherent sales performance, could be central to improving this situation.

Table 3.6: Domestic Travel by Irish Residents
Number of Trips (000s) by main county visited in 2014

	County	Attribute	Volume (000)
	Dublin	Coastal	1,357
			
	Cork	Coastal	805
			
1.	Galway	Coastal	774
2.	Kerry	Coastal	673
3.	Wexford	Coastal	501
4.	Mayo	Coastal	432
5.	Clare	Coastal	321
6.	Donegal	Coastal	274
7.	Westmeath, Roscommon & Longford	Inland	262
8.	Waterford	Coastal	255
9.	Limerick	Coastal	209
10.	Wicklow	Coastal	202
11.	Kildare & Carlow	Inland	193
12.	Sligo	Coastal	187
13.	Cavan & Leitrim	Coastal Inland	167
14.	Kilkenny	Inland	166
15.	Louth & Monaghan	Inland	158
16.	Tipperary	Inland	142
17.	Laois & Offaly	Inland	141
18.	Meath	Coastal	138
Total			7,354

Source: Fáilte Ireland – Domestic Travel by Irish Residents 2014

3.3 Supply Side Review

Having looked at the market demand in terms of volume and characteristics, and Tipperary's competitive positioning we now move on to review what it is that the county has to offer. When reviewing market supply, there are many aspects to consider and we will look, in turn, at the key factors - including the physical location as well as the businesses that comprise the industry in the county.

The tourism offering in Tipperary, as elsewhere in Ireland, is composed of both primary and secondary 'product'. Naturally, Tipperary has uplands, lowlands, rivers and a significant lake. All of these provide a setting that facilitates and encourages outdoor activities and independent touring. In addition, the fertile lowlands have encouraged

agriculture over the centuries and are therefore conducive to the production of local foods.

From an industry perspective, the county has a wide variety of accommodation, attractions and activities.

3.3.1 The Location

Location is a key factor in tourism. Where a business or destination is located in terms of accessibility, attractiveness and the features of the surrounding area, is a key determinant in visitor motivation. At first glance, Tipperary is well-positioned to be attractive to visitors, as can be seen from Table 3.7 below, with its central location and easy motorway access. In addition, it is already on a tourist route to several popular tourism hubs such as Cork, Kerry and Clare.

Table 3.7: Driving Distances from Nenagh & Cashel
(in mins/kms)

Urban Centre	Population	Nenagh	Cashel
Dublin	1,110,627	1 hr 45 mins / 162 kms	1hr 47 mins / 167kms
Cork	198,582	1hr 50 mins / 138kms	1hr 4 mins / 94kms
Limerick	91,454	37 mins / 42kms	1hr 4 mins / 60kms
Waterford	51,519	1hr 49 mins / 146kms	1hr 14 mins / 71kms
Galway	76,778	1hr 31 mins / 102kms	2hrs 13mins / 159kms

However, that same motorway network - the M7 and M8 - also makes it easy for visitors to travel straight through the county without stopping, on their way the higher-profile destinations on the Atlantic coast. The challenge is, therefore, to make the most of the central location while also providing potential visitors with sufficient motivation to spend time in the county.

3.3.2 Accommodation

While there are currently 23 hotels registered in Tipperary, there are two points worth noting in this regard. The first is that there are no 5* hotels that might act as destinations in their own right, as they do in other counties where they exist. However, there are 5* hotels in neighbouring counties that are within easy driving distance and with whom industry can develop relevant bundles if required.

Secondly, hotel capacity has decreased in the last five years on the back of a decline in demand. In 2010, there were 28 hotels registered in the county, and feedback from industry indicates that there are now periods and areas of insufficient capacity occurring, with the return to increased demand - a fact that must be taken into consideration when planning for future growth. A contributing factor in this regard is that several of the main hotels have succeeded in creating a corporate niche for themselves, which keeps them busy year round, while others are heavily occupied by catering to functions.

Table 3.8: Hotel Capacity in Tipperary, 2015

Grade	Premises	Rooms	Beds
5-star	0	0	0
4-star	6	333	777
3-star	8	394	987
2-star	7	118	230
1-star	2	20	41
Total	23	865	2,035

Source: Fáilte Ireland

There has likewise been shrinkage in other accommodation capacity, although it is more difficult to quantify. Table 3.9 shows current capacity levels in the county.

Table 3.9: Other Accommodation Capacity in Tipperary, 2015

Type	Premises	Rooms	Beds
Guesthouses	4	27	64
B&Bs	40	165	397
Self-Catering	101 (units)	n.a.	688
Caravan & Camping	7 (227 pitches)	n.a.	960 (eq.)
Hostels	3	n.a.	85
Total			2,194

Source: Fáilte Ireland

It is worth noting that most accommodation is clustered around the key towns in the county, creating the potential for the development of tourism hubs where other services can be integrated to offer an overall tourism experience.

3.3.3 Outdoor Activities

With the range of natural landscape in the county, it is no surprise that activities that use that environment are a key asset in tourism terms. Tipperary has the capacity to meet the requirements of any visitor wanting to participate in their favourite outdoor activity while on holiday. And while the following is not an exhaustive list of all types of activities available, it does illustrate clearly the abundance on offer.

Land-based activities:

- Walking: independent and guided options; signed and mapped routes, both looped and long distance.
- Cycling: independent and guided options; signed and mapped routes, both looped and long distance.
- Equestrian
- Golf
- GAA
- Horse-racing.

Water-based activities:

- Angling
- Cruising
- Sailing
- Kayaking/canoeing/water-skiing
- Guided lake tours.

Remembering that walking/hiking is the most popular active pursuit among overseas visitors, and also popular with the domestic market, as well as water-based activities being popular with the domestic market, it is favourable that both are available in the county. However, it must also be remembered that they are still only appealing to a minority of visitors as the main reason for a visit and are therefore best integrated as part of an overall holiday.

3.3.4 Heritage / Culture

Tipperary's other key strength is in the area of heritage and culture, particularly built heritage. With a wealth of both established and relatively unknown sites of historic and cultural significance around the county, visitors with an interest in heritage - or simply

looking for an interesting day out - have plenty to choose from. Indeed, in terms of significant heritage attractions, Tipperary has several, as can be seen from Table 3.10.

Table 3.10: Visits to Top Visitors Attractions in Co. Tipperary, 2013 & 2014

Attraction	National Ranking	No. Visitors 2013	No. Visitors 2014
Rock of Cashel	21	255,338	372,503
Holy Cross Abbey	33	150,000	200,000
Cahir Castle	65	67,713	66,747
Brú Ború	86	50,000	50,000
Roscrea Castle & Damer Hse.	112	26,541	29,987
Swiss Cottage	125	22,558	22,802
Cashel Heritage Centre	135	20,000	10,000
Farney Castle		14,100	15,400
Mitchelstown Cave		10,900	10,600
Ormonde Castle		9,922	9,116
Main Guard		5,954	n.a.
Lár na Páirce		200	n.a.

Source: Fáilte Ireland, latest available.

A less formal measurement, but very relevant from a consumer perspective, is TripAdvisor, where visitors have listed a variety of attractions and provided feedback on their experiences. Those mentioned include:

- Glen of Aherlow
- Holy Cross Abbey
- Athassel Priory
- Tipperary Racecourse
- St. Declan's Way
- Farney Castle
- Upper Limits
- Tierney's Bar & Restaurant
- Cahir Abbey
- Tipperary Crystal – Irish Design Centre, Dovehill
- Athenny High Crosses
- Damer House Gallery
- Tipperary Excel.

Tipperary also has seven heritage towns, four of which are walled towns, and a variety of gardens and other cultural 'attractions' such as historically-themed driving routes, genealogy facilities and historic tales and folklore that can be dipped into in order to create a sense of place for visitors. The wide range of history and heritage presented by these sites means that the county has the ability to deliver themed offerings in all four areas identified as the pillars on which Ireland's Ancient East rests: Ancient Ireland, Early Christian Ireland, Medieval Ireland and Anglo Ireland.

Despite the strength in this area, though, the majority of attractions are extremely limited in terms of interpretation and animation, and some are difficult to both find and access (e.g. Athassel Priory).

3.3.5 Other 'Products'

In addition to the core aspects of the tourism product - places to stay and things to do - Tipperary also has a variety of other tourism-relevant experiences. The following is a list of the most significant of these, along with a simple rating in terms of strength.

- Landscape / scenery +++
- Genealogy ++
- Arts/crafts +
- Food Producers & Related (e.g. cookery schools, markets) +++
- Dining +
- Festivals +
- Driving Routes +
- Childrens' Activities +

Although not a physical product, local and regional stories - both legends and histories - are a valuable asset in tourism terms if they are woven into the fabric of the area through animation, guiding, interpretation and promotional material. In addition, the focus of Fáilte Ireland's Ancient East proposition on the importance of storytelling offers an opportunity to avail of regional supports to develop this aspect of the 'product'.

3.3.6 Sector Characteristics

Tourism in Tipperary is characterised by being predominantly composed of a variety of geographically-separated, small family-run businesses. While accommodation is clustered around key towns, activity and other tourism providers are more rurally-based. In addition, many are lifestyle businesses and are therefore satisfied with a basic level of

business without a desire to actively chase additional numbers or revenue. There are both positive and negative aspects associated with this point. On the positive side, visitors looking to slow down and experience authenticity have the potential to do just that with these operators. However, on the negative side, Tipperary as a destination lacks some of the necessary drive required to raise its profile and the operators themselves may be lacking in skills and knowledge that would benefit them commercially.

Generally, there is also a lack of awareness of the importance of networking across the county although, having said that, there is a small group of innovative, enthusiastic providers (mainly relative newcomers to the sector) that are leading the way in terms of product development and marketing.

3.4 Research Findings

As part of the work programme completed in preparing this plan, the CHL team undertook a programme of workshops and consultations together with site visits and a mystery shopper tour. A summary of the findings of this research is presented in this Section.

3.4.1 Consultations

A broad consultation was undertaken as part of the Plan development work. Given the fact that this is the first time a Plan has been developed for the entire county, it was considered important to allow all interested parties to input into the process. The consultation process included: two public meetings and two industry workshops along with face-to-face and telephone interviews with operators, industry representatives and agencies (a list of consultees is included in the Appendix). While some issues were raised that pertained specifically to an individual operator, there was broad consensus around particular areas, as outlined below.

- 1) Apart from the domestic family market, Tipperary is unlikely to keep tourists for longer periods as the majority want to see as much of the country as possible.
- 2) Tipperary has recognition as a name but there is a tendency to mistakenly assume this means consumers are familiar with *where* the place is.
- 3) Tipperary has plenty to offer, despite some gaps in evening dining and accommodation in specific areas, but isn't 'putting itself out there.'

- 4) Tour operators consider that Tipperary has a lot more to offer than what has been presented to date through packaging or sales to the wider trade. There's an issue of awareness within the urban centres (Dublin & Cork) as to what Tipperary has to offer the visitor. It would appear that while the trade in Tipperary work hard at maintaining their businesses at a local level, there has been a lack of active selling to the wider tourism sector. This is a missed opportunity.
- 5) The integration of local artisan produce and the Food Plan into the tourism offering is critical in raising the profile of the county for the main target consumer segments.
- 6) Tourist information points are either lacking or ineffective.
- 7) Towns are, on the whole, not tourism focused - with the result that opportunities are not being maximised (e.g. lack of Sunday morning openings in Cashel to facilitate arrival of early bus tours).
- 8) There is a weakness in industry networking and its understanding of what Tipperary, as a whole, has to offer target consumer groups.
- 9) There appears to be a lack of confidence and engagement among much of the industry - not helped by hotel and other closures as well as financial constraints, which are the legacy of the last ten years. There is also a lack of confidence that any new process will succeed.
- 10) Tipperary County may have previously been viewed as split between North and South in its tourism offering. It is time to connect the assets, experiences and opportunities across the entire county with an integrated approach to tourism development and promotion.
- 11) The historic north/south division of the county still underpins tourism trade dynamics in the county, with a hidden border in how the County is considered as a tourism destination and a perceived concentration of activity in the south of the County. All the same, there appears to be greater dynamism and hunger for business in the north than in the south and with an integrated support mechanism through the Tourism Company membership scheme this is likely to become less evident.

- 12) There is poor broadband connectivity in much of the county, which greatly affects industry's ability to service modern consumers' expectations in terms of timely content, imagery, video, etc.
- 13) Community activists are ageing, with little incentive for others to step into their shoes as there is little recognition for the work they undertake from a tourism perspective.
- 14) Outdoor activities, heritage and food are the key strengths of the destination - with food a relative newcomer and therefore in need of greater promotion and integration as a tourism 'product'.
- 15) Sporting events, the equestrian sector and festivals, although niches, have the potential to deliver high-spend.
- 16) The tourism trade is made up of established, older trade and new, up and coming, providers. It's important to create cohesion and collaboration across the sector while recognising that both the traditional as well as the newer, more experimental, approaches have something to offer in moving Tipperary on as a tourism destination.
- 17) The tourism trade in Tipperary is passionate about their place and product. There is some collaboration but, more widely, people concentrate on their own business. There is a gap in knowledge about what's happening around the county as well as about what services and experiences are available elsewhere.
- 18) Rural and community tourism makes an important contribution to the overall Tipperary Experience. Usually lead by passionate individuals, consideration needs to be given to how this grass roots element can feed into more formal tourism actions.

3.4.2 Mystery Shopper

Members of the team visited 11 towns in County Tipperary. While this element of the project was limited due to budgetary and time constraints, and the fact that it was conducted out of season, it does provide relevant feedback that has been integrated into the overall review of the destination. The experience at each location is detailed in Appendix 1 and represented against a range of key aspects of the tourism journey in a scoring matrix.

In contributing to the process of development as outlined in Section 4, the following points applied to all towns, which could do more to:

- remove out-of-date notices both at the edges of the towns and in the towns themselves;
- ensure that current signage is well-maintained;
- develop signage and way-finding for the town
- develop orientation for visitors who might like to hire bikes, go riding or do any of the rural walks that have been developed;
- encourage retailers to use hand-painted signs and maintain their shopfronts properly;
- animate the historic buildings;
- develop the Farmers' Markets.

3.5 Conclusions & Implications

Several conclusions have been drawn from the market review that influence the shape and direction of this Plan.

- a) Tipperary's principal tourism strengths are outdoor activities, heritage, landscape and food.
- b) The markets that Tipperary can best cater for are:
 - the domestic family market, for whom outdoor activities, the abundance of free things to do and the availability of both mid-range hotels and rented accommodation are attractive;
 - the UK 'Culturally Curious', for whom Tipperary's strengths in heritage, walking and food, as well as its undiscovered nature, are attractive; they do, however, require high quality accommodation with attention to detail;
 - the UK 'Great Escaper', for whom outdoor activities and food are attractive as they are trying to escape busy, urban lifestyles.
- c) Smaller, niche, opportunities exist in targeting foodie, equestrian and corporate segments as well as special interest visitors (i.e. those specifically motivated by one activity, e.g. walking, cycling, watersports, an event). Short breaks focusing on luxury accommodation and food, with the support of group activities, touring and walking, will appeal to the first three segments.

- d) As the largest consumer segments are independent travellers with a broad interest in either culture or the outdoors, providers are likely to have greatest success by integrating their products into more general bundles aimed at the underlying needs of the segments rather than driven by the 'product' itself.
- e) The central location of Tipperary and ease of access needs to be maximised as an asset rather than being perceived negatively as is currently the case.
- f) Given the geography of Tipperary and the clustering of accommodation, towns have the potential to be tourism hubs in their own right and to act as gateways to the surrounding areas but are in need of more development as well as buy-in by local businesses, as mentioned in detail in Section 3.3.7.
- g) Local and seasonal deficits in accommodation need to be addressed in the first instance by more integrated use of outlying accommodation through encouraging co-ordinated transport/pick-ups/bundling/etc.
- h) An audit of engaging stories that can be used to animate the destination through Ireland's Ancient East would be useful.
- i) An overall animation programme for key attractions would also be beneficial in attracting visitors and in providing a greater sense of place.
- j) More active engagement of communities will help with ongoing local projects as well as with building increased pride and local knowledge.
- k) Capacity- and trust-building activities are required for the industry.
- l) A well-focused, modern and integrated marketing approach is required to raise awareness of Tipperary as a tourism destination.

4. TIPPERARY TOURISM PLAN FRAMEWORK

4.1 Introduction to the Strategic Framework

The success of an overall tourism experience relies on a variety of elements. These include:

- the overall location and sense of place in which a holiday takes place,
- the individual products/experiences with which a visitor interacts,
- the capacity of the industry to deliver on visitor needs, and
- the profile and promotion of the destination.

The Tipperary Tourism Plan addresses all of these elements and is founded firmly on five pillars. These pillars form an integrated framework and their strength depends on a **close working relationship** and **common focus** by the tourism industry and development agencies in order to deliver a high-quality, unified, Tipperary proposition. Section 5 details the respective roles across the sector and how they best work together to meet the aims of this Plan including greater trade engagement which is crucial to successful delivery. The five pillars are:

- 1) Destination Development
- 2) Product Development
- 3) Industry Development
- 4) Marketing
- 5) Measurement.

While the overall implementation of the Plan will be under the direction of Tipperary County Council and the Tipperary Tourism Company, it is a key recommendation that five working groups be established to guide the delivery of each key Strategic Pillar. The working groups should consist of at least two members of the Tourism Company alongside relevant agency, trade and other interested parties (e.g. cultural heritage facilities, community groups etc.) - with the exact mix to reflect the work to be undertaken and the connections required for delivery.

Within each of the five strategic pillars, a number of priority actions has been identified, and a summary of these is provided in Table 4.1. Each of these is addressed both at a strategic level in the remainder of this section and at a more practical level in the Action Plan that follows. Implementation of these recommended actions will raise the profile of

Tipperary as a tourism destination, increase the ability of the industry to deliver high-quality tourism experiences that appeal to Ireland's main target segments, and support the long-term sustainability of tourism in the county.

Section 1 recognised the opportunity in approaching a unified Tipperary Tourism Plan for the first time. To some degree this engages a range of County Council departments who are reviewing policy and actions from a county-wide perspective. Strategic Pillars 1 and 2, in particular, can be positively influenced by inter-departmental collaboration.

For example, The Tipperary Food Plan 2015 – 2020 outlines ambitions within the food industry which would add considerable value to the Tipperary proposition and inform the central tenet of one of the sample bundles (Ref. Toolkit 7.1). Both the Arts and Culture and Heritage departments are in the process of developing new strategies which reference the county as a whole, and which carry over themes from previous strategies such as supporting indigenous talent, integrating experience with towns and landscapes, and authentic local storytelling. These themes are rich in possibility for guiding approaches to way-finding, interpretation and animation, and enhancement of the public realm.

It is obvious that a collaborative approach between public bodies, the tourism industry and community is required to implement the priority actions successfully. As a result, the more detailed Action Plan that follows in Section 6 identifies not only the individual actions required under each priority but also the parties responsible for delivery, the potential budget required and possible funding sources.

Table 4.1: Summary of Strategic Priorities for Tipperary

Strategic Pillar	Priorities	Rationale
1. Destination Development	<ul style="list-style-type: none"> • Adopt a zoning approach to destination development to maximise limited resources. • Enhance key towns and villages within the four zones, with particular attention to: presentation, orientation, availability of tourism services and provision of quality tourist information. • Ensure integration at agency level and appropriate (and active) representation on Tourism Company board. • Develop community initiatives to foster volunteerism and local knowledge. 	<ul style="list-style-type: none"> - Supporting visitors' ability to explore and enjoy the diverse product and experiences that Tipperary has to offer.
2. Product Development	<ul style="list-style-type: none"> • Animation of key heritage sites. • Audit of 'stories' . • Encourage refurbishment and upgrading of tourist accommodation where required. • Address weaknesses in broadband provision. • Grow a select number of festivals that have the capacity to attract significant visitor numbers. 	<ul style="list-style-type: none"> - Maximising opportunities within the Ireland's Ancient East project. - Addressing key weaknesses.
3. Industry Development	<ul style="list-style-type: none"> • Harness the energy of leading industry figures that are currently highly visible and active. • Build skills and confidence. • Facilitate bundling with a focus on target consumer segments. • Provide mentoring services. • Offer membership development programme in the Tipperary Tourism Company. 	<ul style="list-style-type: none"> - It is essential that individual tourism providers are empowered to sustainably run their businesses and fulfil customer expectations. As the industry is composed of both experienced and less-experience operators, a variety of supports is required.

Strategic Pillar	Priorities	Rationale
4. Marketing	<ul style="list-style-type: none"> • Develop clear brand identity, preferably in synergy with food branding. • Offer Tipperary as a unified proposition. • Facilitate bundling with a focus on consumer needs. • Focus marketing and sales initiatives on best prospect segments. • Exploit primary marketing channels: digital (website, social media, blogs), trade/consumer shows, events & direct sales. • Secondary marketing channels: targeted advertising, publicity and consumer promotions. • Integrate offers with Ireland's Ancient East (IAE) as far as possible. • Maximise opportunities arising out of Food Plan. 	<ul style="list-style-type: none"> - An overall marketing campaign will place Tipperary on the 'map' for potential consumers and provide a platform for industry to sell. - Bundling with a focus on visitor needs ensures that industry remains consumer-centric. Focusing on best prospect segments and integration with IAE will synergise with national agency efforts. - Using cost-effective and co-operative marketing mechanisms will make the most of limited resources.
5. Measurement	<ul style="list-style-type: none"> • Establish a simple county-wide occupancy and visitor feedback survey (a sample is included in Toolkit 6.4). • Undertake a peak-season on the ground survey (using students) to gather destination-related feedback within the development zones. • Ensure all activities undertaken through the framework of the Plan are monitored for effectiveness and future actions amended accordingly. 	<ul style="list-style-type: none"> - National statistics are not accurate at a county level and therefore feedback and measurement at that level is lacking. By putting a simple measurement mechanism in place, the industry and agencies can more easily understand local tourism dynamics and engage with future planning. - Future activities under each Strategic Pillar will be best guided through monitoring the effectiveness of previous ones.

4.2 The Tipperary Vision & Proposition

Underpinning the five strategic pillars is an understanding about what it is that Tipperary 'stands for' as a destination and how consumers can experience it. This common focus - or vision - will guide future activities, both at an individual and at a destination level.

In view of Tipperary's variety of landscape and heritage, artisan foods, easy access and relative uncommerciality, the following destination vision is proposed:

"The undiscovered heartland of Ireland - abundant in authentic, yet-to-be discovered experiences that are rooted in a land even more ancient than the historic buildings that remain, yet fully in harmony with the modern world."

The differentiating characteristics of Tipperary can be summarised as follows.

- Unspoilt and undiscovered yet within easy reach (just take a turn off the M7 or M8 and you're there!
- Ideal as a base for touring visitors who don't see the county boundaries - easy access to major sites and destinations e.g. Cliffs of Moher, Kilkenny Castle, Cork City.
- Variety of landscapes: fertile lowlands, a number of mountain ranges, lake and river experiences, can all be experienced in one holiday (think Ireland's version of 'sea & snow')
- Significant food product.

As a destination, it will appeal to visitors for a variety of reasons:

- **Practical:** Easy drive; offers what they want (food, good accommodation, things to do).
- **Emotional:** Slow, real, authentic, provides the opportunity to de-stress, connect with loved ones, remember what is important in life.
- **Curiosity:** undiscovered experiences, sites and landscapes made easy by packaging (diy/pre-packaged), signage (downloadable trails, signed routes, etc.) and promotion.
- **Specific interests:** outdoor activities (esp. hill walking, biking, watersports), heritage, food.
- **Fashion:** the new food destination (home of Dexter cattle, Cashel Blue, etc.)

Specifically, Tipperary is an appealing destination for three, best-prospect, target consumer segments for a variety of reasons:

- **Great Escapers & Connected Families** want to visit because of the abundance and variety of unspoilt landscape (water, lowlands, uplands), and the abundance of activities with which to enjoy them, from gentle strolls to serious mountain biking to watersports for all ages and abilities.
- The **Culturally Curious** want to visit because, as the fertile heartland of the country, Tipperary attracted wealth - which resulted in a wonderful heritage of historic buildings, good produce and the stories that go with that.

4.3 Strategic Pillar 1: Destination Development

This strategic pillar seeks primarily to develop the overall destination of Tipperary by the greater integration and active participation of stakeholders, by focusing limited resources primarily on key areas, and by encouraging community involvement.

Tipperary is a county of diverse landscapes and fragmented administrative history and there is a lack of unification in tourism terms. Counties such as Cork, Waterford or Kilkenny present a very obvious urban – rural offer with one major town from which tourism radiates. In Tipperary's case, the county may not have a central focal 'hub' that might act both as a magnet for tourism as well as a catalyst for tourism in the surrounding areas. Tipperary actually boasts three key hubs which have not been fully developed as yet to become pivot points of this hub and spoke type model. With the motorway network that cuts straight through it, the temptation for visitors is to keep travelling to the next obvious tourism 'hub' - only stopping off briefly at attractions that are on the main route. The challenge, therefore, is to facilitate easier access to the variety of tourism offerings that exist in Tipperary and to encourage visitors to stay. These hubs are detailed further in this section.

In line with the approach being taken by Fáilte Ireland in the roll-out of Ireland's Ancient East, the development of some 'signature experiences' within Tipperary will greatly enhance both the appeal of the destination for consumers and the ability of the destination to deliver on visitor needs. It must also be recognised that Tipperary County Council has already identified the strategic aims of developing Lough Derg, the Munster Vales, the Butler Trail and the River Suir water activity hub.

Moreover, having reviewed tourism in the county, the profile of the core target segments and the approach of other comparator destinations, it makes sense for Tipperary to adopt an approach to tourism development and marketing that maximises current clusters of products - using them to attract and orient visitors to the surrounding areas.

Therefore it is recommended that development efforts are focused on particular zones within the county, using major towns as gateways and facilitating trade in offering holiday experiences that showcase the best of what Tipperary has to offer. All of county Tipperary sits within the Ireland Ancient East, these zones highlight how best to develop a clear communication of the breadth of what Tipperary has to offer under this over arching brand.

There are four zones within the county around which tourism assets are naturally clustered and that can be used both to prioritise development and to bundle experiences. The main towns in these zones can act as gateways - orientation points into the wider area - as well as providing dining, shopping, accommodation and other essential components of the tourism experience. These zones also connect easily to larger tourism destinations across the county boundaries - facilitating the desire of overseas visitors to make the most of their visit to Ireland. For example, the Atlantic coast of the Cliffs of Moher is only 1.5 hours from Nenagh - an easy day trip for an independent traveller.

In addition, there are two particular areas within these zones that have been previously identified as having strong international potential. These are the Lough Derg area, lying predominantly in Zone A (see Figure 1) and the Munster Vales area, lying across Zones C & D.

Visitors don't see county boundaries and Tipperary has the opportunity to maximise its central location and good road network by providing a base from which visitors can explore the country while returning to the county for accommodation, dining and other activities. Figure 1 clearly shows the natural connections between the zones and other tourism destinations outside of the county.

The map also illustrates the role of the main towns in the county in unlocking tourism product within the surrounding area, creating Signature Experiences that are based on geography and/or themes. For example,

- **Zone A.** Roscrea & Nenagh can act as hubs and orientation points for the Lough Derg Lakelands. The wider zone naturally links across into Galway and Clare.
- **Zone B.** Nenagh & Thurles can act as hubs and orientation points for the Slieve Felim and Silvermines Mountains. The wider zone naturally links across the border to Clare, Limerick and Kilkenny.
- **Zone C.** Cashel, Tipperary and Cahir can act as hubs and orientation points for the Glen of Aherlow, Galtees, Munster Vales, Ballyhoura & Knockmealdowns. The wider zone naturally links down into Cork. The Rock of Cashel warrants specific mention as a 'hero product' that has already established itself and can be used to unlock additional benefits for the county through integrated offerings in the town and surrounding area.
- **Zone D.** Clonmel and Carrick-on-Suir can act as hubs and orientation points for the River Suir, Knockmealdowns, The Comeraghs and Slievenamon (Munster Vales), and the wider zone naturally connects into Waterford and Kilkenny.

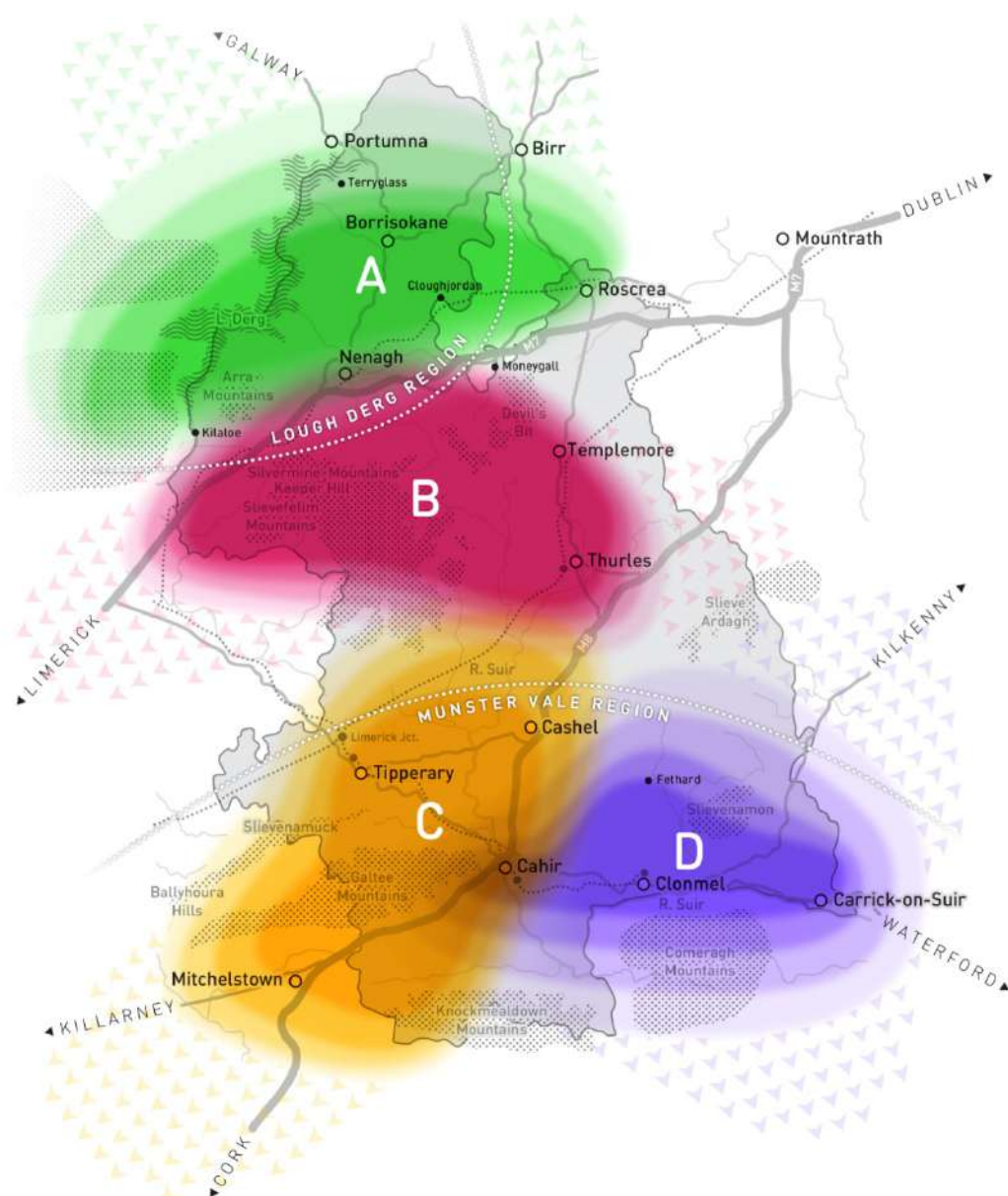
N.B. Please note that the Zones are not rigidly defined in terms of their area, but are intended to support focused development and marketing as opposed to fostering exclusivity.

The delivery of an integrated tourism experience that addresses visitor needs in terms of services, facilitates, orientation, etc., does not fall within the remit of one single agency or authority. Therefore, active collaboration between agencies, industry and community is an essential component in the delivery of this Plan. In addition to identifying lead partners and key dependencies within the Action Plan, and recommending the establishment of Working Groups, there is also a need to ensure that the existing structures are 'fit for purpose'. A review of the members and functions of the Tipperary Tourism Company may be a necessary first step in actioning this plan and has been included in the Action Plan alongside other destination-specific activities.

The role of the community is also a crucial one in the development of any tourism destination. The community, deliberately or accidentally, helps to create the sense of place that many visitors are seeking when they come to a destination such as Tipperary. More specifically, community volunteers are responsible for many tourism-related products and facilities. These include the development and maintenance of walking and cycling trails, Tidy Towns committees, festival and event organisation, cultural/artistic exhibitions and guiding. It has already been noted that the ageing of volunteers within Tipperary, and the lack of involvement of younger residents, is an issue for the county.

For that reason we have included activities in the Action Plan that seek to encourage community knowledge and involvement. Appendix 4 presents active community groups who can provide excellent resource at a local level.

Figure 1: The Relationship of Zones, Gateway Towns and Surrounding Counties



4.3.1 Priority Towns and Villages for Development

To assist with the enabling of the actions set out in this Plan, the following towns and villages have been selected on the basis of their strategic importance - either as gateway towns or as towns/villages that may enhance and facilitate tourism. An important mechanism for driving local development will be activated through the relevant municipal districts. It is intended that the municipal districts will take a leading role in establishing what is required on the ground to improve their tourism infrastructure such as way finding, public realm improvements and road repairs. With this in mind, and also taking into consideration those with active volunteer groups in place (Tidy Towns), the following have been prioritised for development within the period of this Plan for public realm improvement and for development of appropriate tourism services.

Table 4.2: Priority Towns and Villages for Development

Municipal District	Priority Level 1 - Gateway Towns ³ :	Priority Level 2 - Towns/Villages with Strategic Potential ⁴	Priority Level 3 - Towns/Villages with Potential to attract Stop-Offs ⁵
C. - Clonmel	Clonmel (C)	Terryglass (N)	Birdhill (N)
CT - Cashel - Tipperary	Roscrea (TT)	Silvermines (N)	Cloughjordan (N)
CS - Carrick-on-Suir	Nenagh (N)	Dromineer (N)	Emly (CT)
TT- Templemore - Thurles	Cashel (CT)	Upperchurch (TT)	Lorrha (N)
N - Nenagh	Cahir ©	Holycross (TT)	Portroe (N)
	Thurles (TT)	Borrisokane (N)	Rossadrehid (CT)
	Tipperary (CT)	Ballina (N)	Fethard (CS)
	Carrick-on-Suir (CS)	Clogheen (CT)	Cloneen (CS)
		Fethard (C)	Dundrum (CT)
		Templemore (TT)	Ardfinnan (C)
			Ballingarry (CS)

³ Towns that have a critical mass of accommodation and services to act as overnight bases for visitors to explore the surrounding areas from.

⁴ Towns/villages that have a) scored highly in Tidy Towns, indicating a motivated community and an attractive stop-off point for visitors, and b) are significant due to providing access to/presence of tourism activities.

⁵ Towns/villages that have a) been relatively high scorers in Tidy Towns, indicating a motivated community and an attractive stop-off point for visitors, and/or b) are close to tourism-significant attractors.

4.4 Strategic Pillar 2: Product Development

This strategic pillar seeks to maximise opportunities represented by Ireland's Ancient East and to address weaknesses in the product base.

As was discussed earlier in the Plan, Fáilte Ireland's new initiative to develop a zone along the eastern part of the country that hinges on the theme of Ancient East presents opportunities for Tipperary to develop and bundle relevant tourism experiences that can avail of this new promotional vehicle. The bundling aspect will be addressed in the Marketing section that follows, but there are specific areas of product development that will enhance the county's ability to be a lead player in Ireland's Ancient East - primarily by further development of the overall destination experience (discussed previously), the enhancement of the visitor experience at heritage sites, and the integration of relevant cultural stories.

Some weaknesses have also been identified that need to be addressed in order to improve the potential of the county to attract and keep greater visitor numbers. Specifically, these include:

- the deficiencies in broadband provision that prevent the industry from uploading/downloading/streaming internet content that targeted consumers expect to see in researching their holiday options;
- the relative small scale of most festivals/events in the county;
- the shortage of sufficient quality accommodation in key tourism hubs during peak times;
- the need for consistently excellent services at Lough Derg Lakelands and Munster Vales as focal points for tourism development in the region.

4.5 Strategic Pillar 3: Industry Development

This strategic pillar seeks to empower and enable the industry to be effective, knowledgeable business managers.

From both the workshops and from the consultation process, as well as from the market review, it is clear that the tourism trade in Tipperary constitute a disparate group, comprising a mix of experienced, older trade and newer market entrants. Within the group, there are also those that have had negative experiences with development agencies and tourism agencies in the past, as well as those that have had positive ones.

Therefore, there is not necessarily a single approach to supporting trade in the county that will work for all.

However, it is imperative that the tourism trade is empowered and enabled to attract and satisfy customers. In practical terms, this means that the Tourism Company and its agency partners have the role of ensuring, through mentoring, facilitation and leadership, that tourism operators have the necessary knowledge, skills and connections to operate in a competitive environment. In other words, the role of the agencies is to help the trade help itself. In shouldering these responsibilities, the agencies can draw on the substantial amount of resources available - both in terms of existing guidance and toolkits and in terms of agencies offering relevant business training. A list of those most relevant is included in Section 7.

4.6 Strategic Pillar 4: Marketing

This strategic pillar seeks to position Tipperary as an appealing and accessible holiday destination primarily for the three target segments that offer greatest potential for growth - Irish 'Connected Families' and overseas 'Culturally Curious' and 'Great Escapers'.

To fully 'unlock' Tipperary, consumers must initially be aware of what it has to offer and then to be in a position to buy and experience it. This relies on a number of factors, including:

- the ability of individual operators to market themselves in a manner that consumers can relate to;
- the availability of well-priced offers tailored to the interests of the target market segments;
- the availability of experiences that appeal to the core needs of consumers;
- easy purchase/booking facilities.

The role of the agencies is limited with regard to how far they are able to market Tipperary for a variety of reasons. Firstly, they are not product 'owners' and therefore are not in a position to actively negotiate and sell. Secondly, they are limited in terms of both financial and staff resources. They do, however, have a key role in supporting, facilitating and leading the marketing of Tipperary as a tourism destination.

Bearing in mind all of these points, the strategic approach to marketing Tipperary involves the following essential elements:

- 1) The development of a brand - a unified 'look and feel' - for tourism in Tipperary and the alignment with it of all marketing activities, whether by individual businesses or by the Tourism Company.

- 2) The use of low-cost, responsive, marketing and distribution channels: primarily the internet, social media, blogs, database building, direct sales, publicity and targeted promotions. Daily attention to audience-building, attention-seeking, creative networking - all with a clear focus on the target segments - needs to be at the heart of destination marketing for Tipperary and therefore a tourism-aware digital marketing person is a pre-requisite for the successful delivery of this Plan. This could potentially be a shared resource with the Food network or similar. A list of recommended marketing channels to be used as a starting point is included with the relevant activities in the Action Plan, as well as in the sample bundles in Section 7, but they need to be reviewed regularly according to performance (see the section on Measurement below).

- 3) The development of holiday experiences that clearly address consumer needs and are easily accessible: sample bundles have been developed and are included in Section 6.

- 4) The facilitation of bookings through linking to operators' own websites and existing platforms with existing substantial audiences. With limited resources, it is not recommended that Tipperary develop its own booking engine. However, it is recommended that it adopt a similar approach to the Lough Derg website, providing a platform to promote bundles and offers but linking out to either individual lead operators (e.g. an accommodation provider) or to an existing booking engine. It is recommended that Tipperary be highly visible on all large channels including Tripadvisor, Airbnb, Discover Ireland (Fáilte Ireland), etc. All of these have the facility to book both individual businesses as well as bundles and many provide analytics and metrics that help to measure and refine offers. Examples of appropriate platforms and tools are included in Section 7.

- 5) The active engagement of, and support for, innovative members of the trade who are already chasing business in the international marketplace via the new Marketing Working Group.

4.7 Strategic Pillar 5: Measurement

This strategic pillar seeks to ensure that those involved in tourism in Tipperary have the data and understanding they need to guide future plans and investment decisions. It seeks to establish additional forms of monitoring and measurement that will provide consumer feedback on their experiences within the county as well as measuring the outcome of all activities undertaken as part of this Plan.

While national agencies, such as the CSO and Fáilte Ireland, gather data on tourism volume and behaviours, this information is not always available at a county level nor is it sufficiently up-to-date to inform quick adjustments to plans in order to respond to ongoing market changes. In addition, the integration of monitoring and measurement as a key part of any action plan is good practice as it helps to refine future activities to either capitalise on positive outcomes or to prevent unnecessary wastage.

Within this Plan, a sample occupancy/booking survey is recommended for distribution to all tourism businesses in the county, with data being collated and analysed every season. It is also recommended that qualitative visitor surveys be held during peak season in key tourism zones. Both of these are referenced in the toolkit in Section 6. In addition, each action listed in the Action Plan has an associated Key Performance Indicator against which its progress can be measured and one of the functions of the Working Groups is to review these KPI's as the Plan progresses. Section 5, Plan Implementation – Funding, Interdependancies, and Critical Success Factors - gives an overview of key strategic considerations including critical success factors which are a helpful lens through which to review actions and progress over the lifetime of the Plan.

5. PLAN IMPLEMENTATION - FUNDING, INTERDEPENDENCIES, AND CRITICAL SUCCESS FACTORS

5.1 Implementation

The implementation of the Plan will require detailed operational planning addressing issues such as action planning, scheduling, funding, budgeting and resource allocation, performance review systems, management information systems, key performance indicators, and a clear understanding of critical success factors. The interconnection between these elements is summarized in Figure 2 below.

Figure 2: Tourism Plan Development Interconnection

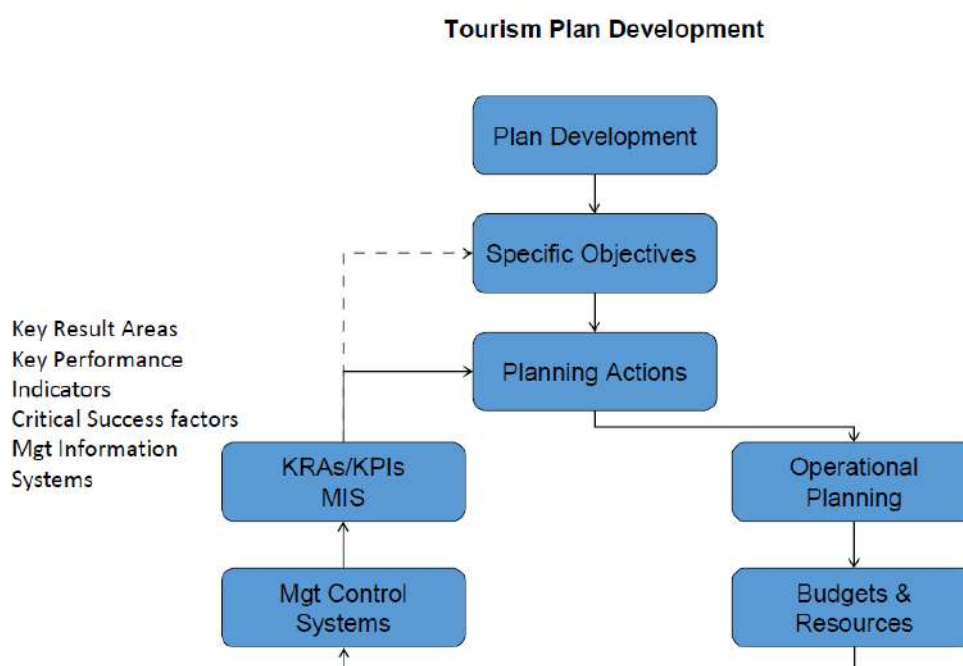


Figure 2 represents Plan implementation as an iterative process, where forward-looking activity on the right-hand side is routinely accompanied by performance review and outcome assessment activities on the left. These are based on a Management Information System which draws upon a set of pre-determined KPIs (key performance indicators).

5.2 Tipperary Tourism Company & Local Context

5.2.1 Evolving Tipperary Tourism

Tipperary Tourism Company's primary objective is:

To promote market and develop Tipperary as Ireland's premier inland visitor destination in both domestic and overseas markets. To encourage sustainability through the improvement and addition of product offering, up skilling providers and extending visitor lengths of stay and increasing spend within the country.

Ref. Constitution of Tipperary Tourism Company Limited by Guarantee 2014

Tipperary Tourism Company is an action lead company with an enabling function for the tourism trade based in Tipperary. Its entire membership is intended to provide direction for initiatives which the trade can engage in to build capacity individually and cross sector.

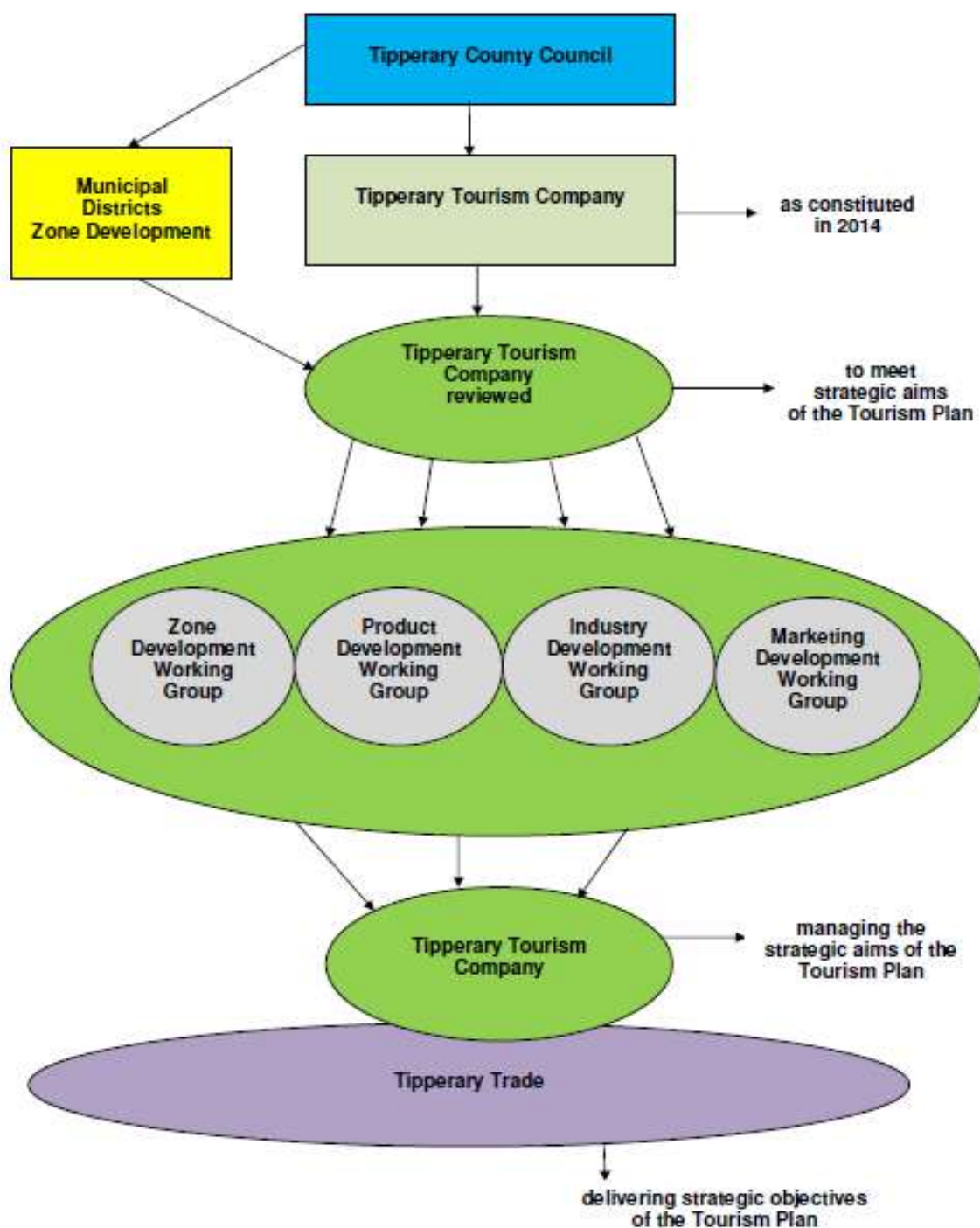
Tipperary Tourism Company was constituted in 2014. Directors serve a four year terms after which they step down. Directors can seek re-election with a maximum cumulative service of nine years.

It is the recommendation of this Plan that the working groups laid out in the action plan be made up of members of Tipperary Tourism Company with expertise from within the Council framework available to enable the actions where required. For example, in the case of zonal development Tipperary County Council leads on setting priorities for the Municipal Districts to action. The Municipal Districts can accordingly feed into the process of delivery of the Plan's objectives by Tipperary Tourism Company.

Where capacity is an issue Tipperary Tourism Company should review its membership between now and 2018 with a view to fully resourcing the sub-groups which are required to keep the actions of the Plan evolving. Criteria for leadership of a sub-group should be based on the understanding of the work programme, availability to commit to support the work programme and capacity to drive forward trade based development which will empower success within the sector. With the key output to achieve growth and increase economic return the ideal membership of Tipperary Tourism Company is from within the trade itself with supporting strategic inputs from the wider and connected business community. Policy and strategic planning, the provision by Tipperary County Council, may benefit from Tipperary Tourism Company insight and expertise but this is not a core task for the Company.

Figure 3 below illustrates how Tipperary Tourism Company may evolve over the next two years.

Figure 3: Tipperary Tourism Company – Evolving to Meet Plan Needs



With an informed membership representative of the trade and associated tourism agencies, Tipperary Tourism Company can generate a mechanism for growth. Ultimately, growth will be led by members, the trade, who should be consumer focused and sales oriented with a robust framework for capacity building and wider strategic development lead by Tipperary Tourism Company.

Tipperary Tourism Company members benefit from a range of supports to ensure they can perform at their peak. Improving the overall environment and strategic position as illustrated in Figure 6 creates a more robust baseline from which members can sell into a thriving tourism sector. Membership packages are detailed in Appendix 3 subject to further development by Tipperary Tourism Company.

5.2.2 Local Context

Never before has there been such opportunity for connectivity across the region as the amalgamations for North and South Tipperary has instigated a review of strategies to reflect the County wide agenda. There are refreshed strategic plans for heritage, arts, festivals and events from within the Council which provide opportunities to think strategically across departments creating synergies which ultimately effect satisfaction levels for visitors.

'Tipperary County Council will support and facilitate the delivery of a mix of vibrant and sustainable festivals and events across the County that engage the community in a variety of ways and have a tourism, cultural, sporting, musical or artistic focus and which contribute significantly to quality of life. In particular, TCC will seek to ensure that this Plan supports the objective of the Council to raise the profile of Tipperary as providing a strong national cultural offering.'

Ref. Tipperary Festivals & Events Plan March 2016 – Draft

The Council has also been engaged with a number of strategic work programmes which bring a focus on asset development including the development of blue ways at Lough Derg and the River Suir, the Butler Trail and interpretation for the Glen of Aherlow. In certain instances these take place in the context of cross county collaboration as is the case with the Lough Derg Roadmap and the Tourism & Marketing Plan for the Munster Vales.

This synthesis can also be found within the wider development framework for Tipperary. The LECP recognises the significant role tourism has to play in the economic buoyancy of the County in its Local Economic Plan 2015 – 2020 and the Action Plan for Jobs 2015 speaks directly to tourism as a driver for creating employment but also to agriculture and the green economy which are relevant and related to tourism in Tipperary as a rural destination.

5.3 Funding

Funding requirements will need to be determined for each of the five years of this strategic planning framework. While it is not possible at this early stage to be prescriptive as to the exact activity mix that will be scheduled each year at the operational stage, nor on the funding mix that will be required to support this activity, it is likely that such activity will each year include some or all of the following elements:

- Product / Infrastructure
- Capital Investment
- Marketing
- Sales
- Seasonal Programmes & Events
- Enterprise Supports
- Training.

It is likely that the actions to be taken at operational level will be more focused on tourism business development, experience development, sales and marketing, and product bundling rather than large-scale capital investment works. It is likely also that Tipperary County Council will, as occasion arises, seek to augment its own budget resources with supplementary funding from agencies such as Fáilte Ireland, LEO and the two Tipperary Leader companies. Small scale funding for small businesses could also be accessed through Microfinance Ireland. Fáilte Ireland has already introduced capital funding programmes to support capital works relating to product development under the Ireland's Ancient East proposition. Over the 2016-2021 timeframe of this Plan, it is anticipated that Fáilte Ireland will introduce programmes of a similar nature to support tourism product capital development.

Typically, successful grant applications in this area demonstrate a strong performance in relation to four principal considerations:

- 1) Is the proposed project a tourism one (as opposed to the development of local amenity facilities for local residents)?
- 2) Does the proposed project align closely with Fáilte Ireland's own strategic priorities (i.e. major tourism propositions currently being promoted)?
- 3) Does the proposed project generate "value added" for Irish tourism - does it generate a positive Net Present Value (NPV) based on the capital funding invested?
- 4) Does the grant applicant possess the management, marketing, promotional, and project management skills to deliver the project and ensure it operates sustainably into the future?

Developing a detailed funding model will be a vital task in the initial stage of Plan implementation. It is likely that the funding model developed will be based upon a mix of Tipperary County Council own resources as well as contributions and grants from agencies with responsibility for areas such as tourism development, local development, and enterprise supports. This funding model will comprise both capital and current expenditure elements, although the principal development focus in this Plan is on tourism business development, product bundling initiatives, and a strong emphasis on capability development in sales (as opposed to marketing). While there will also be scope for tourism product development initiatives, the Plan is not envisaged as a large, infrastructural, capital development-led initiative but rather a strategic application of financial supports from a range of partners in meeting the overall development objectives for the County.

An indicative expenditure profile is set out in Table 5.1 below.

Product animation and live experiences have become an important element of the visitor experience and increasingly valuable in impacting on visitor expectation. The thirst for the authentic is enhanced by indigenous stories brought to life. This is no longer only the traditional interpretations of history through costumed guides, although they are of value and relevant to certain products, but also incorporates external animation through live installation, visuals, lighting and performance, and destination events such as festivals across arts, sports, food and special interests and living history & story telling in context. Section 6 refers to the potential in an integrated approach to way-finding, public realm, interpretation and animation with the cultural and heritage departments of Tipperary County Council to create a collection of permanent and seasonal collateral which is distinctive and unique to the County.

**Table 5.1: Indicative Funding Profile
(Per Annum 2016-2021)**

Focus Area	Line Items	Amount (€)	Comment
Product Infrastructure (Capital Development)	Heritage Asset Refurbishment	250,000	As underway with Fethard Thosel
	Public Realm Improvements incl. wayfinding & interpretation	250,000	Fáilte Ireland/LEO/ Heritage Council
Product Animation	Street Animation	30,000	Investment at a range of levels & Partners ref Action Plan 2.4
	Storytelling / Interactive	20,000	
	Festivals & Live Experiences	100,000	
Enterprise Supports	Sales Techniques	0	Ref. Toolkit 6.3
	Consumer Profiling	7,500	As required Ref. Toolkit 6.8
	Service Excellence Programmes		
	Business & Financial Skills Development	50,000	

The toolkit in Section 7 refers to a range of very thorough resources which will support the tourism trade in product development and offer guidance and platforms for selling. Existing business supports are available through the Local Enterprise Office and sales skills specific workshops could be readily designed and one-on-one mentoring provided where resources are made available.

5.4 Interdependencies

Figure 5 summarises the importance of stakeholder inter-dependency in terms of delivering a tourism Plan at the level of the individual destination. The yellow tiles in the mosaic represent actions that can be undertaken by the national tourism authorities. Some of the green tiles represent interventions that can be delivered by the local authority. However many of these green tiles represent actions that can only be undertaken by the local tourism industry itself, other local business interests, as well as civil society and local community groups. The point here is that successful tourism destination development cannot be engineered in isolation by Tipperary County Council or Tipperary Tourism Company. Some very significant inter-dependencies are at play in the implementation of such a Plan and, typically, some successful coordination is required to make this work well.

Tipperary County Council and Tipperary Tourism Company can however play an essential role in linking between national agencies, the tourism trade, other business interests, civil society, and community groups.

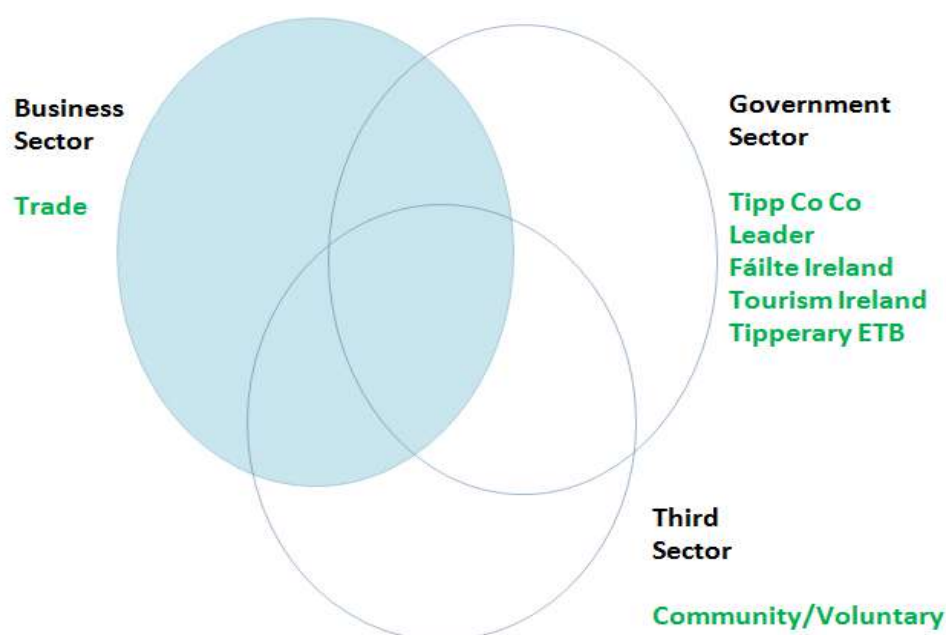
In all likelihood, the successful management and coordination of this particular process will represent the single most important “critical success factor” for successful project implementation over the next five years.

Figure 4: The Tourism Destination Development ‘Mosaic’



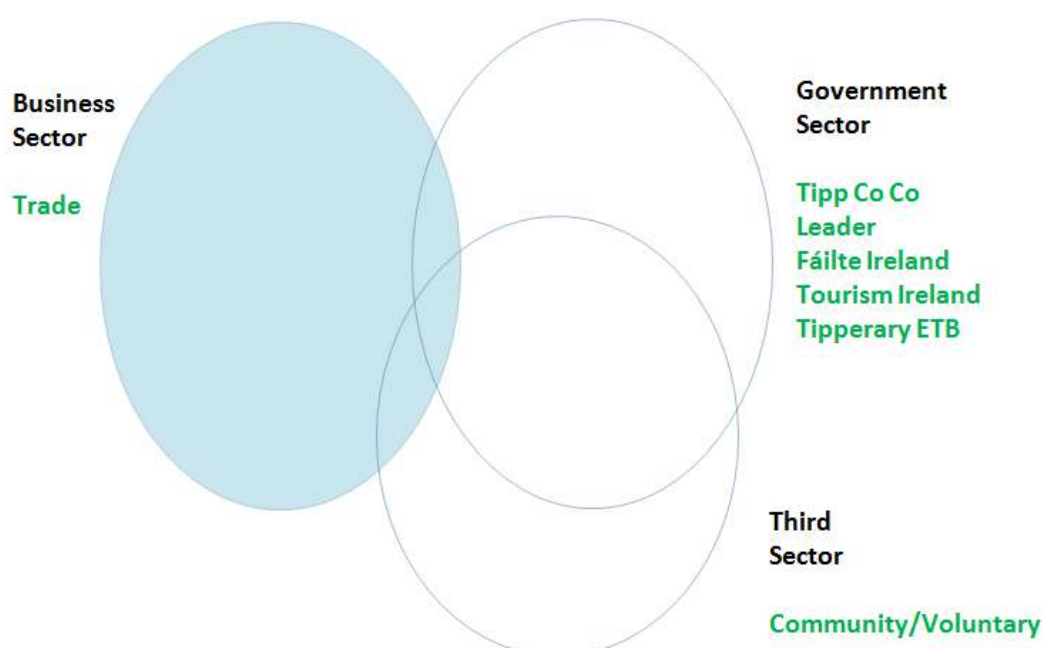
Creating a fertile environment for growth is much wider than the tourism sector alone. There are interdependencies between all stakeholders in delivering a strong foundation for Tipperary Tourism to grow. Figure 5 illustrates how the wider stakeholder groups contribute to tourism in Tipperary as a whole.

Figure 5: Creating Conditions for Growth



With partnership and collaboration around an agreed set of actions and goals, as laid out in the Action Plan, preferential conditions are created to support sales. Sales are actively undertaken by the trade who are best placed to sell themselves and each other through bundling mechanisms which are a key characteristic of this Plan. Figure 6 reflects how the emphasis shifts when direct sales is the goal.

Figure 6: Generating Growth Through Selling



5.5 Critical Success Factors

As outlined at the beginning of the document, this Plan has been created in a unique environment: one of change and of opportunity. Tipperary, for the first time, is managed as a single county and while collaboration between North and South was a norm, the wider lens of a unified approach brings greater scope of the kind of vision which has informed this Plan.

The newly created Tipperary Tourism Company will be a vehicle for driving initiatives for tourism in the county at a macro level and together with the trade, has a key role in bringing to life the mechanics of this Plan and building an on-going commitment to work in a new way to strengthen Tipperary's viability as a growth destination within Ireland.

Working with the Plan, the critical success factors outlined below will act as a touchstone for activities and initiatives, returning the thinking back to the characteristics for success which will underpin the delivery of this Plan.

- 1) Is Tipperary ready to sell itself?
- 2) Is Tipperary open for business?
- 3) Is it packaged / bundled to maximise the Tipperary experience?
- 4) Are we offering unique / authentic experiences?
- 5) Are we price competitive?
- 6) Are we quality competitive?
- 7) Are we digitally savvy – visible on social media?
- 8) Do we have trade champions / leaders for this initiative?
- 9) Is it working / selling?

By using these questions as a 'check in' during the planning and implementation of the Tipperary proposition, the answer would ideally be yes to all of them. Where it's not, it highlights an area that requires greater attention which provides a helpful ongoing tool for those involved in delivering the Plan.

6. ACTION PLAN

At the outset of this Plan a headline goal was set for Tipperary to move into the Top 3 destination counties in the Ireland's Ancient East over the five-year lifecycle of the Plan. The subsequent sections of the document detail specifics of Tipperary's tourism assets, the type of visitors who are most likely to enjoy what Tipperary has to offer, and a strong proposition for how the Tipperary offer will be promoted. The Plan has looked at how best to articulate this proposition through bundling between a range of experiences. It has made a recommendation on how to position Tipperary within the context of its shoulder counties and how best to market clusters or zones in the county which are outward looking and allow for permeability at a local level and cross country.

In this Section is a set of actions which are intended to address all aspects of the business of growing tourism in Tipperary. The actions reflect marketing, infrastructural and organisational requirements which inter-relate to resource the delivery of bundles, the Tipperary proposition and the ultimate aim to grow Tipperary's tourism position .

The actions of the Plan are linked to timelines which consider a period of strategic growth over five years. It should be considered as a working Action Plan which will be further shaped by Tipperary County Council in terms of time and resources available and influenced by the energy and enthusiasm of the partners.

Table 6.1: Action Plan for Tipperary

Strategic Pillar & Focus Area	Line Item (in order of priority)	Related Line Items	Lead Party	Key Dependencies	Budget € / Potential Source of Funding	Time Line	Key Performance Indicators
1. DESTINATION DEVELOPMENT							
1.1 Organisational Structure	i) Generate operational work plan for the Plan and review human resource requirement against current available.		Tipperary County Council	None	€17,000 pro rata p/t tourism assistant	Qtr 2 2016. Review and generate annual operational plan in the final quarter of each year.	Development of monthly operational plan to ensure momentum and focus.
	ii) Agree ongoing CPD and mentoring to ensure the Tipperary County Council Tourism Staff are in a position to activate and lead in delivering the Plan.	Line Item 1.1, point i).	Tipperary County Council / LEO	None	€2,000 per annum	Immediate and ongoing. Annual reviews in line with operational planning.	Feedback from the Tourism Officer as part of ongoing annual performance review.
	iii) Review existing Tourism Company structure in light of strategic objectives and revise membership as appropriate.		Tipperary Tourism Company	None	0	Qtr 2 2016.	Any necessary changes complete by 2018

Strategic Pillar & Focus Area	Line Item (in order of priority)	Related Line Items	Lead Party	Key Dependencies	Budget € / Potential Source of Funding	Time Line	Key Performance Indicators
	iv) Establish Zone Development Working Group in each Municipal District.		Municipal Districts supported by Tourism Company	Active participation of bodies/operators required e.g. County Council, OPW, reps from town business associations, etc.	0	Commence Qtr 4 2016.	Rolling out across all Municipal Districts by end of 2017
	v) Following assessment of industry needs, agree membership packages that support overall strategic objectives.	Line Item 3.3, point i).	Tourism Company	None	0	Qtr 3 2016. Review and update Qtr 3 annually along with operational planning.	70% of trade signed up by October 2016
1.2 Zone Development	i) Agree animation programme at heritage sites in/near gateway towns - commencing with Cahir and Roscrea.		Z.D. Working Group	OPW / Chambers of Commerce / Business Associations	€30,000 per site / Support through Leader/Fáilte Ireland	Pilot two sites in summer 2016, two more in 2017. Review end 2017 and plan for 2018-2021.	Visitor feedback through qualitative survey
	ii) Review and ensure there is a formal link with all existing tourism groups in the county to ensure consistency, e.g. attendance at key annual meetings.		Tourism Company	None	0	Qtr 4 2016	Completed by end 2016

Strategic Pillar & Focus Area	Line Item (in order of priority)	Related Line Items	Lead Party	Key Dependencies	Budget € / Potential Source of Funding	Time Line	Key Performance Indicators
	iii) Review of key priorities in gateway towns and villages, using mystery shop feedback as a starting point - see also point viii. Guidelines for developing historic towns are referenced in Section 6.	Line Item 1.2, point iv).	Z.D. Working Group	County Council / Town Chamber of Commerce /Business Associations	0	Qtr 2 2017	Completed by end 2017
	iv) Audit existing tourist information points and ensure central availability of quality tourist/orientation information in each gateway town.	Line Item 1.2, point iii).	I.D. Working Group liaison with Mkt Group	Tourism Company	0	Qtr 2 2017	Completed by end 2017
	v) Develop action plan to address priorities in gateway towns and villages.	Line Item 1.2, point iii) and v).	Z.D. Working Group	County Council / Town Chamber of Commerce /Business Associations / Tidy Towns Associations	€-€€€ dependent on outcome of review / Support through Fáilte Ireland/Leader/ County Council	Qtr 2 2017. Roll-out 2017-2021	Action plan agreed and tasks allocated by early Qtr 2 2017, with roll-out over duration of the Plan
	viii) Review of key priorities in existing/developing Lough Derg, Munster Vales, Butler Trail, River Suir programmes to ensure consistency with each other and integration with this over-arching Plan		Tipperary County Council	Tipperary County Council / Z.D. Working Group	0	Qtr 4 2016	Completed by end 2016

Strategic Pillar & Focus Area	Line Item (in order of priority)	Related Line Items	Lead Party	Key Dependencies	Budget € / Potential Source of Funding	Time Line	Key Performance Indicators
	ix) Lead Lough Derg Marketing Plan Group and implementation of Roadmap	Line Item 1.2, point viii).	Tipperary County Council	Tourism Company		Ongoing	Ongoing
	x) Lead the development of the Munster Vales	Line Item 1.2, point viii).	Tipperary County Council	Tourism Company		Ongoing	Ongoing
	xi) Lead the further development of the Butler Trail across the county	Line Item 1.2, point viii).	Tipperary County Council	Tourism Company		Ongoing	Ongoing
	xii) Lead the development of the River Suir as a water activity hub	Line Item 1.2, point viii).	Tipperary County Council & Tipperary Sports Partnership	Tourism Company		Ongoing	Ongoing
1.3 Community Engagement	i) Audit active community groups and agree ongoing liaison mechanism.		Tourism Company & Municipal District Adminsitration	None	0	Qtr 2 2017. Regular review of liaison as part of annual operational planning.	Completed by Qtr 3 2017

Strategic Pillar & Focus Area	Line Item (in order of priority)	Related Line Items	Lead Party	Key Dependencies	Budget € / Potential Source of Funding	Time Line	Key Performance Indicators
	ii) Agree recognition scheme for community achievements in tourism.	Line Item 1.3, point i).	Z.D. Working Group	Tourism Company & Municipal District Administration	0	Qtr 3 2017. Roll-out 2017-2021	Completed by end 2017
2. PRODUCT DEVELOPMENT							
2.1 Organisation	i) Establish Product Development Working Group		Tourism Company	Active participation of required bodies/operators e.g. County Council, key cultural tourism operators, Leader	0	Qtr 2 2016 Appoint new Working Group	Operational with clear objectives and task allocation by end 2016
2.2 Ireland's Ancient East	ii) Story audit to select stories with potential for integration into IAE bundles/tours/animation		PD Working Group	None	0	Qtr 3 2016	Completed by end 2016
	iii) Develop four IAE experiences to be offered through bundling (see 4.3 below) to target consumer groups and tour operators.	Line Item 2.2, point i).	PD Working Group	Trade	0	Early Qtr 4 2016	Ready for marketing November 2016

Strategic Pillar & Focus Area	Line Item (in order of priority)	Related Line Items	Lead Party	Key Dependencies	Budget € / Potential Source of Funding	Time Line	Key Performance Indicators
2.4 Festival Development	i) Support festivals, events and live experience which embody the Tipperary offer		Tipperary County Council	Festival organisers	Local grants per festival / Support through Fáilte Ireland grant scheme/Leader / Arts Council / Heritage Council	Qtr 4 2017	Festivals and development programme agreed by end 2017
3. INDUSTRY DEVELOPMENT							
3.1 Organisation	i) Establish Industry Development Working Group.		Tourism Company	Active participation of required bodies/operators e.g. LEO, Leader, industry 'leaders'	0	Qtr 3 2016 Appoint new Working Group	Operational with clear objectives and task allocation by September 2016
3.2 Developing tourism awareness and engagement	ii) Establish networking and familiarisation programme for industry across the county and across the border with important complimentary products.	Line Item 3.3, point i).	ID Working Group	Trade, Funders	Budget to cover venue hire & transport only - operators to provide participation of experiences	Qtr 1 2017	Programme to run annually thereafter
3.3 Build business capabilities and address organisational issues based structure & on capacity	i) Audit industry needs through simple survey. Assessment of skills, capacity.		ID Working Group	Trade	0	Begin Qtr 4 2016 Ongoing provision for assessment and supports as part of membership.	Completed by start of Qtr 1 2017

Strategic Pillar & Focus Area	Line Item (in order of priority)	Related Line Items	Lead Party	Key Dependencies	Budget € / Potential Source of Funding	Time Line	Key Performance Indicators
	ii) Establish workshops and one-to-one mentoring programme to address key issues: finance, understanding customer needs, marketing, product innovation.	Line Item 3.3, point i). Also Line Item 1.1, point v).	LEO	ID Working Group, Trade, LEO, Leader	€20,000 - €60,000/ seek to secure synergies with existing LEO programmes with funding - Leader	Commencing early 2017 - through off-season thereafter	Participation on the programmes; feedback from participants
4. MARKETING							
4.1 Organisation	i) Establish Marketing Working Group (see Section 6 for useful marketing resources).		Tourism Company	Trade, other county groups involved in marketing Tipperary (e.g. Food Network)	0	Qtr 4 2016 Appoint new Working Group	Operational with clear objectives and task allocation by end 2016
4.2 Branding	i) Establish new 'look and feel' (brand) for destination Tipperary - logo and guidelines for web, publications and partner material.		Tourism Company	Mkt Working Group / County Council / Trade	€20,000.00	Qtr 3 2016	Completed by end of 2016
	ii) Roll-out branding education programme to industry and facilitate alignment through free downloadable templates & guidelines.	Line Item 4.2, point i).	Tourism Company	Mkt Working Group / Trade	€5,000.00	Qtr 4 2016	New branding in use by trade for 2017

Strategic Pillar & Focus Area	Line Item (in order of priority)	Related Line Items	Lead Party	Key Dependencies	Budget € / Potential Source of Funding	Time Line	Key Performance Indicators
4.3 Bundled Offers	i) Lead the marketing of new bundles/routes/concepts. Marketing to include web marketing and limited advertising (see sample Starter Bundles in Toolkit 6.1 and Booking Platforms in Toolkit 6.2 for specifics on channels and platforms).	Line Item 1.1, point v). Also Line Item 4.4, points ii), iii) and iv).	Mktg Working Group	Trade / Tourism Company	No budget required or self-financing by participants	Qtr 4 2016. Ongoing - with review as part of annual operational planning.	Bundles in the marketplace for 2017; also pick-up by a minimum of three incoming tour operators
	ii) Co-ordinate daily social media programme - uploading of news stories, images and offers from the industry and county.		Tourism Company	Web Marketing Staff / Mkt Working Group / Trade	0	Ongoing	Ongoing
	iii) Post-branding, develop brief online Plan that incorporates website, social media, blog, offers and liaison with industry.	Line Item 1.1, point v).	Tourism Company	Web Marketing Staff / Mkt Working Group	€10,000 / funded partially through membership	Qtr 3 2016	In place for 2017
	iv) Finalise Tipperary website, ensuring current feed from Fáilte Ireland or other database provider and developing dynamic special offers page and blog.	Line Item 1.1, point v).	Tourism Company	Fáilte Ireland / Trade / Tourism Company, Mkt Working Group	€5,000.00	Qtr 3 2016	In place for 2017
4.4 Web	i) Employ/assign shared or part-time web marketing staff		Tourism Company	Web Marketing / Publicity Staff	€25,000.00	Commence Qtr 1 2017	Ongoing measurement of audience figures/feedback

Strategic Pillar & Focus Area	Line Item (in order of priority)	Related Line Items	Lead Party	Key Dependencies	Budget € / Potential Source of Funding	Time Line	Key Performance Indicators
	ii) Post-branding, develop brief online Plan that incorporates website, social media, blog, offers and liaison with industry and tourism partners	Line Item 1.1, point v).	Tourism Company	Web Marketing / Publicity Staff	€10,000 / funded partially through membership	Qtr 3 2016	In place for 2017
	iii) Finalise Tipperary website, ensuring current feed from Fáilte Ireland or other database provider and developing dynamic special offers page and blog.	Line Item 1.1, point v).	Tourism Company	Web Marketing / Publicity Staff	€5,000.00	Qtr 3 2016	In place for 2017
4.5 Publicity	i) Employ/assign shared or part-time publicity staff (one day a week or equivalent).		Tourism Company	LEO / County Council / LEADER	€8,000.00	Immediate	Ongoing measurement of audience figures/feedback
	ii) Review annual Tipperary event calendar for publicity opportunities and ensure that they are maximised e.g. hosting of Food event, opening of Cashel Palace.		Tourism Company	Publicity Staff / Mkt Working Group / Trade /	€2,000.00	Ongoing. Annual review as part of operational planning.	Media coverage / audience figures / feedback
	iii) Familiarisation trip annually for journalists.		Tourism Company	Trade / Fáilte Ireland / Tourism Ireland	0 - experiences to be provided by trade	Qtr 1 2017 onwards. Annual review as part of operational planning.	Successful delivery and resulting press coverage

Strategic Pillar & Focus Area	Line Item (in order of priority)	Related Line Items	Lead Party	Key Dependencies	Budget € / Potential Source of Funding	Time Line	Key Performance Indicators
	iv) Post-branding, organise photo or similar online consumer competition.		Tourism Company	Publicity Staff / Mkt Working Group / Trade /	Prizes donated by trade	Qtr 2 2017 Annual event if successful.	Participation
4.6 Publications	i) Post-branding, review existing Tipperary brochures, flyers, etc., and reformat to address the needs of key consumer groups i.e. examine the need for bulky literature and explore other cost-effective promotional vehicles.	Line Item 4.2, point i).	Tourism Company	0	<u>Minimise print material – focus online</u> €30,000 subsidised from membership	Qtr 3 2016 Annual reprint as required.	Material in place for 2017
	ii) Develop downloadable online guides for key segments: family holidays, cultural breaks, outdoor active breaks, food.	Line Item 4.6 point i).	Tourism Company	Trade	Included in above	Qtr 3 2016 Annual re-publishing as required.	Material in place for 2017
4.7 Trade & Consumer Promotions	i) Co-ordination of industry attendance at Meitheal, Dublin, and World Travel Market, London.	Line Item 1.1, point v).	Tourism Company	Trade / Fáilte Ireland / Tourism Ireland	Participation should be conditional on sufficient industry attending to make it self-financing	April & November. Annual event, depending on feedback.	Feedback from participants

Strategic Pillar & Focus Area	Line Item (in order of priority)	Related Line Items	Lead Party	Key Dependencies	Budget € / Potential Source of Funding	Time Line	Key Performance Indicators
	ii) Direct sales to incoming tour operators - start by a review of relevant operators in the Meitheal Overseas Buyers listing (ref. Toolkit 7.3) and analysis of trade database from among Tipperary operators to identify best matches.	Line Item 1.1, point v).	Mktg Working Group	Tourism Company / Trade	Allow €3,000	Ongoing	Ongoing
	iii) Familiarisation trips annually for overseas operators.		Tourism Company	Trade / Fáilte Ireland / Tourism Ireland	0 - experiences to be provided by trade	Qtr 1 2018 Ongoing	Successful delivery and additional business
	iv) ITOA Workshop & member development. Build relationships with the incoming tour operators based in Ireland. Attend IOTA annual workshops (Toolkit 7.7).	Line Item 1.1, point v).	Mktg Working Group	Tourism Company / Trade	Allow €750 per participant incl. expenses	March workshop / relationship development. Qtr 3 2016 Annual and ongoing.	Incoming Tour Operators feature Tipperary proposition and bundles in itineraries
	v) Two Tipperary-specific consumer promotions in conjunction with food.	Line Item 1.1, point v).	Tourism Company	Food Network / Trade	€10,000.00	TBC	2017
5. MEASUREMENT							
5.1 Organisation	i) Establish Measurement Working Group.		Tourism Company	LEO, Leader, County Council, town/site reps	0	Qtr 2 2016 Appoint new Working Group	Operational with clear objectives and task allocation by June 2016

Strategic Pillar & Focus Area	Line Item (in order of priority)	Related Line Items	Lead Party	Key Dependencies	Budget € / Potential Source of Funding	Time Line	Key Performance Indicators
5.2 Visitor measurement	i) Establish simple survey methodology to allow operators and Tourism Company gather quantitative data for planning.		M Working Group	Tourism Company / Trade	€1,000	Qtr 4 2016. Implement 2017-2021	In place for 2017
	ii) Establish peak-season qualitative survey in gateway towns and at main attractions to gather feedback on destinations (see town survey referenced in Toolkit 7.3).		M Working Group	Tourism Company / Site owners/ Trade	€15,000	Qtr 1 2017 Implement 2017-2021	In place for summer 2017
5.3 Activity measurement	i) Ensure all activity undertaken has clear metrics in advance and that measurement takes place.		Tourism Company	All Working Groups / Trade	0	Ongoing	Ongoing

7. TOOLKIT

This Section brings together working examples, support information and links to wider tourism resources which will help to activate the Plan. It is a toolkit which relates to the product development and action plan with information and resources which are relevant across the stakeholder groups of Tipperary County Council, Tipperary Tourism Company and the Tipperary tourism trade. In tandem with supporting conversion of this Plan to a task-oriented work programme, the tool kit includes everything which is required to flesh out, position and sell the Tipperary proposition.

7.1 Sample Bundles to Unlock the County

7.1.1 Bundling Mechanics

Each bundle needs to include a selection of accommodation types, meal options, relevant activities/visits/services and a free downloadable introduction to the 'theme' that includes suggestions for other, relevant, paid and free activities. As providers of 'packaged' holidays are legally liable, only operators who are already covered for this should lead on packages - e.g. large hotels, incoming tour operators, coach tour operators. Otherwise a 'bundling' approach should be taken, where participating 'products' can be 'bundled' for purchasing by the consumer.

The role of the 'bundling agent' (operator, Tourism Company, etc.) is to facilitate the bundling by coordinating trade to agree discounts/costs, pay any required costs for promotion and ensure good advertising copy and images are prepared.

The two main mechanics that can be used for marketing bundles are:

- 1) Offer inclusive packages with accommodation, meals and pre-arranged activities under one agreed price. In this case, the accommodation provider should be the lead party - taking responsibility for taking payment, contacting other providers, etc.
- 2) Facilitate the visitor in bundling what they want themselves, either via drop-down menus to select accommodation, activities and meals, etc., that are part of an agreed promotional programme, or by including a voucher reference for a discount that is available once one element of the bundle has been purchased. In other words, if a consumer books a day-long cycling experience that is part of a 'get active'

break, they can then book participating accommodation, restaurants, etc., at a discount.

In both cases, the offers should be available across as wide a range of booking and promotional platforms as possible, and participating trade should be actively engaged with pushing them.

THE FOLLOWING BUNDLES ARE A SUGGESTED STARTING POINT AND ARE NOT
EXCLUSIVE: OTHER OPERATORS MAY BE ADDED AND ZONES FLEXED TO SUIT
OBJECTIVES.

Table 7.1: Sample Propositions and Suggested Operators

Signature Experiences	Market Positioning & Sample Text	Marketing Channels	Potential Locations & Partners
<p>‘HIDDEN IRELAND’ (2/3 night break - stand alone or part of a longer Irish holiday): Experience authentic, historic, Ireland. TARGET MARKET: Overseas culturally curious</p> <p>N.B. This can be adapted to cater for specific Ireland’s Ancient East themes by integrating the accommodation, food and driving routes with attractions that fit the four core pillars:</p> <ul style="list-style-type: none"> - Ancient Ireland - Early Christian - Medieval Ireland - Anglo Ireland 	<p>“Discover those hidden gems that the main tourist route bypasses...We know you like the motorway because it gets you there quickly and easily...But we know you like the meandering road that takes you to that undiscovered Abbey or Castle by the river... And the little village whose main street has changed little since the advent of motorised transport...With the rural Irish landscape, rivers and hills as background to your rambles and drives...Accompanied by meals rich in local artisan foods and served with Irish warmth.</p> <p>Welcome to Tipperary’s Hidden Gems - Designed by Those Who Know”</p> <p>Our Hidden Gems breaks do it all...They introduce you to cultural sites and experiences not found on the main tourist trail...Using signed driving routes that you can take at your own pace...With suggestions for where to eat, shop and explore along the way...And recommendations for accommodation in historic buildings with people who understand your interest in culture and heritage.</p> <p>Tipperary - the historic melting pot of Ireland for Kings, Invaders, Rebels, Gold-Platers, Farmers and Monks.</p>	<p>Overseas tour operators</p> <p>Tourism Ireland</p> <p>Tripadvisor</p> <p>Tipperary website</p>	<p>(Using Zones A & C as bases - 90 historic sites around Lough Derg, heritage towns, Farney Castle, Holycross Abbey, etc.)</p> <p>Fuchsia Lane Self Catering Riverrun Self Catering Inch House The Lake Cafe & Guesthouse Abbey Court Hotel Mitchel House restaurant The Peppermill Holycross Roscrea Castle Fancroft House & Gardens Fiddlers Retreat The Craft Granary Art and Healing Centre Lár na Páirce</p> <p>SUPPORT ACTIVITIES: All Lough Derg free heritage attractions looped walks, driving routes, daytime cafes, craft shops.</p>

Signature Experiences	Market Positioning & Sample Text	Marketing Channels	Potential Locations & Partners
<p>A REAL FAMILY HOLIDAY (long weekends and week long holidays)</p> <p>TARGET MARKET: Domestic family market - families with older children/young teens</p>	<p>"We know you want to spend time with them. We also know you need time to yourself. And we know you want to make all that time count... with minimum effort...and maximum enjoyment.</p> <p>Welcome to Family Breaks in Tipperary - Designed by Those Who Know "</p> <p><i>Our family holidays in Tipperary look after it all</i> - what to do together; fun and safe things for the kids to do with other kids; spa, dining, shopping, golf, walking; opportunities to learn new skills and practice old ones; indoor and outdoor options for those inevitable 'wet welly' days.</p> <p>And you can choose what style of accommodation suits you and put it together in whatever way you want. From fully-inclusive breaks to more flexible, design-it-as-you-go breaks, and all within easy driving distance.</p>	<p>Discover Ireland website</p> <p>Tipperary website</p> <p>Irish educational media: Primary Times, Rollercoaster</p> <p>A new web-only downloadable Family Guide to Tipperary</p>	<p>(Using Zones A & C as a base, particularly around Nenagh/Lough Derg and Tipperary Town/Glen of Aherlow)</p> <p>ZONE C: Parsons Green (Clougheen), Fairy Mount Farm, The Apple Farm, Clonmel Park Hotel Aherlow House, Ballykisteen Hotel Mitchelstown Caves, Quad Trekking (Tipperary town) Excel Centre (Tipperary Town), OK Cycle & Sports Hillcrest & Solohead Equestrian Centres</p> <p>ZONE A: Pallas Hill Open Farm, Ring of Lough Derg, All the active water-based activity providers around Lough Derg, Abbey Court Hotel, Anner Hotel, Fuchsia Lane Self Catering, Biko Park Ireland, The Source Arts Centre, Thurles (family events), Cloughjordan (children's workshops)</p> <p>SUPPORT ACTIVITIES: Parks, playgrounds, cinemas, leisure centres, petting farms, indoor playcentres, heritage attractions, Upper Limits Climbing Wall, Munster Vales, looped walks, cycle routes, picnic areas. Also hotels on the edge of these areas. e.g. Hotel Minella (Zone D).</p>

Signature Experiences	Market Positioning & Sample Text	Marketing Channels	Potential Locations & Partners
FOODIE BREAK (short breaks): Great, up-and-coming, food destination TARGET MARKET: Overseas culturally curious; domestic indulgent romantics	<p>"We know you love food - discovering new places to dine, new ways to cook, new flavours to experiment with. We know eating out is a priority in making or breaking a holidays. And we know the term foodie isn't perfect but it still fits.</p> <p>Welcome to the new Foodie Breaks in Tipperary - Designed by Those Who Know"</p> <p>Our foodie breaks do it all...Visit some of our artisan food producers, discover new favourites, browse local markets, learn new cooking skills... Oh, and eat, of course! Breakfasts, lunches and dinners made by other foodies using as much locally and sustainably produced ingredients. And plenty of rambling walks and signed driving routes in stunning scenery to explore in between.</p> <p>Tipperary - home of Michelin favourite Dexter beef, Cashel Blue and Cooleeney cheeses, Crowe's Free Range Bacon and many other artisan food producers.</p>	<p>Discover Ireland website</p> <p>Tourism Ireland</p> <p>Overseas tour operators</p> <p>Tipperary website</p>	<p>(Using Zones C & D as bases)</p> <p>Ballykisteen Hotel</p> <p>Kilkieran Cottage</p> <p>The Old Convent</p> <p>Inch House Black Pudding</p> <p>Crossogue Preserves</p> <p>Killenure Castle Dexter Beef</p> <p>Chez Hans</p> <p>Cashel Blue</p> <p>Crowe's Farm Shop</p> <p>The Apple Farm</p> <p>Fiacri House Cookery School</p> <p>SUPPORT ACTIVITIES: Local markets, other food producers, driving routes, loop walks, cycle hire, shopping and eating in Clonmel and Carrick-on-Suir.</p>

Signature Experiences	Market Positioning & Sample Text	Marketing Channels	Potential Locations & Partners
<p>THE OUTDOOR GYM (short and week long breaks): The real gym! Fresh air; all levels of experience catered for; pursue your obsession or start a new one; no need for equipment; option for tuition/guiding.</p> <p>TARGET MARKET: Overseas great escapers; domestic footloose socialisers</p>	<p>“We know you always put walking down as one of your hobbies, but how often do get to do more than a quick stroll? And we know there is a mountain bike stashed somewhere that is gathering dust. But how long is it since you felt the exhilaration of climbing to the top of a hill to admire the view? Or the thrill of biking down a muddy slope? And we know you’d like to share the fun.</p> <p>Welcome to the Active Breaks in Tipperary - Designed by Those Who Know”</p> <p>Our active breaks do it all...Remember old passions and use them to reignite current ones...Oil the rusty wheels (and legs!)...Try out new things - bike in the morning, lake board in the afternoon...Challenge yourself during the day then kick back at night with good locally grown food...While your muddy boots are cleaned and wet gear dried.</p>	<p>Discover Ireland website</p> <p>Tourism Ireland</p> <p>Overseas tour operators</p> <p>Tipperary website</p>	<p>(Using Zones A & B as a base)</p> <p>My Next Adventure</p> <p>Climb Ireland/Walk in Ireland</p> <p>Bike Park Ireland</p> <p>Flanagans/Ring of Lough Derg</p> <p>Spirit of Killaloe Cruises</p> <p>Watermark Ski Club</p> <p>Fiddlers Retreat</p> <p>Caravantasia</p> <p>Eco Village</p> <p>Orchard Restaurant/Fairways Bar</p> <p>The Derg Inn</p> <p>Crossogue Equestrian, Thurles</p> <p>Fuchsia Lane Self Catering</p> <p>Riverrun Self Catering</p> <p>Abbey Court Hotel</p> <p>SUPPORT ACTIVITIES: Signed/mapped walking and cycling routes; bike hire; cafes & restaurants.</p>



7.2 Sample Booking Platforms

7.2.1 TripAdvisor

Tripadvisor offers not only a listing option but also a host of services and facilities that can be used to bundle, promote and measure the performance of a wide variety of tourism products. These include free webinars, up-to-date feedback on buyer behaviour, advice on best practice, etc.

For example, see the Insights section for more details:
<https://www.tripadvisor.ie/TripAdvisorInsights>


Cheap Province of Munster Holidays & Packages - TripAdvisor 18/02/2016 16:08

 Cheap Province of Munster Holidays & Packages Hi, Freya € 


Province of Hotels Flights Holiday Rentals Restaurants Things to Do Best of 2016 Your Friends More Write a Review



Province of Munster, Ireland, Europe

Europe > Ireland > Province of Munster > Province of Munster Holidays and Packages

 We check over 200 sites for the **lowest hotel prices.**

Province of Munster Holiday Packages



Province of Munster Holiday Packages

Want to book a holiday to Province of Munster? Whether you're off for a romantic holiday, family trip, or an all-inclusive holiday, Province of Munster holiday packages on TripAdvisor make planning your trip simple and affordable.

Find the perfect holiday package for Province of Munster on TripAdvisor by comparing Province of Munster hotel and flight prices. Travellers like you have written 242,648 reviews and posted 0 candid photos for Province of Munster hotels. Book your Province of Munster holiday today!

Search Province of Munster holiday packages

Dublin, Ireland - Dublin Airpc

Dublin, Ireland - Dublin Airpc

dd/mm/yyyy

dd/mm/yyyy

1 Person

7.2.2 Airbnb

Although this was initially intended as an accommodation marketing platform, it provides an opportunity for operators to cross-sell activities to visitors while differentiating themselves from competitors by appearing more responsive to their customers. Activities that are frequently cross-sold by accommodation providers on Airbnb include pre-cooked meals, guided tours, activity tuition and event attendance.

<https://www.airbnb.ie/host>

Why rent your space on Airbnb?

Hosts in 190 countries welcome travellers into their homes to earn money and meet people from all over the world.

No fee to list

Creating a listing page is free. You'll only pay a 3% service fee when you confirm a reservation.

Communication is easy

Exchanging messages will help you select guests who are a good fit for your listing. You can review their profiles and the reviews they've received for more detail.

You're in control

You set the price for your listing, your availability, and reservation requirements for your guests. You can also set custom prices to earn more during popular travel seasons.

You have our support

Airbnb's global support team is available 24 hours a day. And eligible hosts are protected up to €800,000 with the Airbnb

7.2.3 Discover Ireland

This is Fáilte Ireland's consumer-facing website for the domestic market. It provides a platform for bundled offers in a range of different formats, from timed and seasonal offers through to themed breaks featuring a variety of products.

Springtime escapes

Plan a fresh, new springtime break with these special offers around Ireland.

[Search All](#)

Mid-week breaks



Discover great mid-week breaks in Ireland – there's something to suit all budgets.

[Search All](#)

Weekend getaways



Take some time out and get away from it all with the perfect weekend break in Ireland.

[Search All](#)

Spa breaks



Recharge your batteries in 2016 with a rejuvenating spa break in Ireland.

[Search All](#)

Ideas for Valentine's breaks



Discover incredible romantic locations to take someone special this Valentine's Day.

[More romantic ideas](#)

Things to do in Ireland



From forest walks to arty activities, get inspired with ideas for things to do around Ireland.

[Discover activity ideas](#)

INSPIRATION FOR ROMANTICS

REDISCOVER ROMANCE IN IRELAND THIS SEASON.

WHAT'S ON

MAKE THE MOST OF WHAT'S HAPPENING THIS MONTH AND PLAN A BREAK IN IRELAND.

ESCAPE WITH FRIENDS

FIND FUN THINGS TO DO WITH FRIENDS IN IRELAND.

[About Discover Ireland](#)
[About Special Offers](#)
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[Tourist Information Offices](#)
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7.2.4 Tourism Ireland

Tourism Ireland is the agency responsible for promoting the island of Ireland in the overseas markets.

2016 Experiential offers for Ireland's Ancient East on Ireland.com

Activities: Advertising, Direct & e-marketing, Website listing

Suitable for: Accommodation groups and associations, Outdoor activity providers / Wellness, Attraction groups and associations, Transport - Car hire & Coach hire, Dining and entertainment, DMC, Festivals, Golf, Individual accommodation properties, Individual attractions, Tourism networks, Shopping, Guided tours

From: 09/12/2015

To: 31/12/2016

Sign up by: 16/02/2016

Website: <http://www.ireland.com/en-gb/articles/regions/irelands-ancient-east/irelands-ancient-east/>

For More Info: [Gavin Connolly](#), Dublin

Ireland's Ancient East will be one of Tourism Ireland's main themes in 2016. A major integrated campaign will kick off in January and be run across multiple channels to promote the region highlighting how Ireland's Ancient East allows visitors to wander through 5,000 years of history. The campaign will include advertising, e-marketing, social media, publicity and trade activity. You can avail of the major exposure this campaign will receive by submitting your Ireland's Ancient East offers which will appear on our consumer website Ireland.com, visited by over 16.5 million potential visitors to Ireland already in 2015. This campaign will drive to the following [Ireland's Ancient East dedicated landing page](#) which will include a range of IAE offers.

All experiential offer will be translated into the five major European languages; German, French, Italian, Spanish and Dutch.

There is no charge to take part in this campaign.

Please adhere to the following criteria when filling out your offers form:

- The offer that appears on Ireland.com must include a price.
- Detailed instructions on how to book the offer for the lead in price must be included and lead directly to a booking page rather than a property home page. This booking page must also have availability loaded for open periods.
- An image is needed for each offer. Image size should be 300px X 200px.
- Validity dates must be provided and the closing date for the offer should be no more than 6 months from the date the offer is submitted.
- No duplication of offers from a property will be accepted, although a property can have multiple offers when they have different elements i.e. 2, 3, 4 night stays with B&B and unique experience/activity.
- Offers that have literal titles and clear descriptions e.g. two nights B&B & visit to a local attraction in Kilkenny for €150 tend to perform better in the European markets.
- Offers that include a five night package in two locations tend to perform better for the North American market.
- All offers are subject to editorial control.
- Offers must meet the campaign criteria to be included in the campaign.
- Please ensure that all partners involved in the offer have agreed to it being supplied for this campaign prior to submission.
- Offers will be accepted on an ongoing basis but to get maximum benefit from the campaign please submit no later than the 16th of February.

Please click [here](#) to submit your offer.

If you have any queries regarding your offer please contact the Tourism Ireland Offers desk at ioffersdesk@tourismireland.com

7.3 Resources for Operators

Guidelines for animation of heritage sites

Sharing Our Stories by Fáilte Ireland, available on the website at http://www.Failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/2_DevelopYourBusiness/3_MarketingToolkit/5_CulturalTourism/HeritageInterpretationManual.pdf?ext=.pdf

And interpretation exercises are to be found here:

http://www.Failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/2_DevelopYourBusiness/3_MarketingToolkit/5_CulturalTourism/HeritageInterpretationExercises.pdf?ext=.pdf

Guidelines for maximising the tourism potential of an historic town.

http://www.Failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/2_DevelopYourBusiness/3_MarketingToolkit/5_CulturalTourism/Historic-Towns-In-Ireland-with-link-1.pdf?ext=.pdf

Visitor Survey for Towns.

[http://www.Failteireland.ie/Utility/Publications-\(1\)/2_DevelopYourBusiness/3_MarketingToolkit/5_CulturalTourism/Historic-Towns-In-Ireland-Questionnaire.aspx](http://www.Failteireland.ie/Utility/Publications-(1)/2_DevelopYourBusiness/3_MarketingToolkit/5_CulturalTourism/Historic-Towns-In-Ireland-Questionnaire.aspx)

Advice on Marketing Overseas.

For country profiles, advice on distribution channels, developing relationships and key contacts see this section of the Fáilte Ireland website:

<http://www.Failteireland.ie/International-sales/Sell-to-overseas-markets.aspx>

Advice on Marketing in Ireland

For guidance on knowing your Irish customer and promoting your business in Ireland:

<http://www.Failteireland.ie/Domestic-sales.aspx>

Advice for Online Marketing

<http://www.Failteireland.ie/Market-Your-Business-Online.aspx>

Listing of Overseas Buyers

Full details of overseas operators who attended Meitheal 2015, along with profile information, can be downloaded here:

http://www.Failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/2_Develop_Your_Business/3_Marketing_Toolkit/9_International_Sales_Toolkit/Overseas-Buyers_2015.pdf

Toolkit for Promoting a Business in Ireland's Ancient East

<http://www.Failteireland.ie/Ireland-s-Ancient-East.aspx>

A guide to services available to tourism operators through Local Enterprise Offices

<http://www.Failteireland.ie/Supports/Local-Enterprise-Office-Supports.aspx>

7.4 Sample Occupancy Survey for Businesses

SAMPLE MONTHLY BUSINESS SURVEY –

FOR ACCOMMODATION, ACTIVITY PROVIDERS & HERITAGE ATTRACTIONS

1. Type of Business (please tick):

1. Hotel / Guesthouse
2. B&B
3. Other Accommodation (please specify)
4. Activity Provider (please specify)
5. Heritage Attraction

2. Location (if rural, please specify nearest town): _____

3. Month: _____

4. Number of visitors/bookings: _____

5. (For accommodation providers only) Bednights booked: _____

6. Maximum capacity for the month (bed capacity for accommodation/guest capacity for other businesses): _____

7. Occupancy rate %¹: _____

8. Breakdown of visitor nationality (number of visitors):

1. Irish: _____
2. British: _____
3. USA: _____
4. France: _____
5. Germany: _____
6. Other (please specify): _____

9. Most common method for visitors to book with you: _____

10. Are your bookings for this month (please tick) -

Up on the same month last year?

The same?

Down on the same month last year?

¹ Visitor numbers or bednights as a % of total capacity

7.5 Heart of Devonshire Membership Rate Card

Heart of Devon Membership Rate Card



The Heart of Devon is a not for profit Company Limited by Guarantee and is led by a private/public sector partnership, ensuring that any profits made are put back into the marketing and development of successful tourism related businesses within the area covered by Heart of Devon.

Additional website packages



There are four annual packages to choose from – **Standard, Bronze, Silver or Gold**. All standard members will receive **all** the benefits detailed above, with the option to upgrade to a higher package for more exposure on www.heartofdevon.com.

Please see separate application form for standard membership fees, which depend on the type and size of your business. Fees start from just £65 + VAT.

Fees for purchasing additional packages (see below for more information on package features):



Bronze (additional £120+VAT)

All standard membership benefits, PLUS:

-  Heart of Devon widget placed on your own website for 12 months – choice of events, things to do or accommodation
-  Gallery image in the relevant section to your business, e.g. 'Hotels', 'Museums'



Silver (additional £240+VAT)

All membership benefits detailed above, PLUS:

-  Placement in 'Must See Heart of Devon' on homepage of www.heartofdevon.com
-  Placement in top-level navigation on www.heartofdevon.com

Gold (additional £350+VAT)

All membership benefits detailed above, PLUS:

-  Gallery image in the main landing pages, e.g. 'Places to Stay', 'Things to Do'
-  Sponsorship of monthly Heart of Devon e-newsletter, sent to 30,000+ consumers. Sponsors will receive a banner advert on the e-newsletter plus up to 50 words and a website link. Sponsorship is for 3 months (3 e-newsletters), with the choice of month to sponsor (first come, first served)

Bronze Package features

Heart of Devon widget

Businesses purchasing the **Bronze package** upwards will receive a free search widget for your own website.

Choose from Events, Things to Do or Accommodation. Tap into our official database of products in the area, enabling you to have the most up to date info on your site.



Heart of Devon Membership Rate Card



Gallery placement

All businesses purchasing the **Bronze package** upwards will be included as a main gallery image in the relevant section of the website e.g. 'Museums & Galleries', 'Hotels' – as shown by the Royal Albert Memorial Museum (right).



Silver package features



Placement in Must See Heart of Devon

All businesses purchasing the **Silver package** upwards will be placed in the 'Must See Heart of Devon' section on the website homepage.

Businesses that appear here benefit from a higher level of exposure on the website and therefore more click-throughs.

Placement in top level navigation

All businesses purchasing the **Silver package** upwards will also be placed in the main website navigation under their location – as shown by the Royal Albert Memorial Museum (below)



Heart of Devon Membership Rate Card



Gold package features

Gallery placement

All businesses purchasing the top **Gold package** will be included as a main gallery image in the landing page of a relevant section of the website e.g. 'Places to Stay' – as shown by ABode Exeter (right)



Businesses purchasing the **Gold package** will also have the opportunity to sponsor our monthly consumer e-newsletter, which gets sent out to 30,000 potential visitors.

Sponsorship includes a story plus a banner advert in the newsletter (shown right).

Sponsorship is for 3 months (3 e-newsletters), with the choice of month to sponsor (first come, first served)

7.6 Top Tidy Towns in Tipperary

Tipperary Tidy Towns Winners and Runners Up

Kilsheelan - Bronze

Terryglass

Highly Commended

Emly - Gold

Birdhill - Gold

Clonmel - Highly Commended & Joint Regional Winner

Silvermines - Silver

Roscrea - Bronze

Nenagh - Bronze

Dromineer - Endeavour Award

Rosegreen - Endeavour Award

Tipperary Tidy Town Hero 2015

Retailer Frank O'Donoghue - Clonmel Tidy Town - Local Retailer: Stuart Martin

Other well-performing towns/villages

(with 286 points as cut-off - the lowest marks in winners' categories in 2015)

- | | |
|----------------|---------------|
| • Kilbarron | • Cashel |
| • Lorrha | • Cahir |
| • Killoscully | • Thurles |
| • Ballingarry | • Rossadrehid |
| • Upperchurch | • Cloneen |
| • Holycross | • Dundrum |
| • Cloughjordan | • Ardfinnan |
| • Portroe | • Cappawhite |
| • Ballina | • Newcastle |

7.7 Irish Tour Operators Association

The Incoming Tourism Operators Association (ITOA) of Ireland represents 30 member organisations bringing leisure and business visitors to Ireland.

In 2015 ITOA members:

- delivered 470,000 overseas visitors to Ireland who spent €418 million when holidaying or here on business.
- managed a variety of incoming business including group tours, independent travellers, incentives and conferences.
- spent €8 million marketing and selling Ireland in overseas markets.
- brought visitors to every region in Ireland and stayed longer than the national average length of stay – with group tour clients staying on average 7 nights and individual package holidays visitors staying 5 nights.

The ITOA runs an annual workshop, usually in March, in two locations in the country (one of which is Dublin) where members of the tourism trade can pitch products / bundles / itineraries to tour operators and DMCs. It is an excellent place to start positioning new propositions. A number of the members offer self-drive or chauffeured packages and itineraries, so it's important not to think 'coach tour' only when dealing with the ITOA members.

Outside of the workshop, approaches can and should be made directly to the trade. They are booking tours and itineraries one year in advance at least. It's best to approach an operator with a concrete proposition and, where possible, offer bundles and packages that are ready to be incorporated into an existing itinerary or could form the basis for a new one. The operator will advise if they would like to modify an offering or make additions that would work better for them.

For Tipperary, a good place to start is with operators already featuring Tipperary. Current ITOA members who feature Co. Tipperary in their coach itinerary are as follows:

Table 7.2: ITOA Members who feature Tipperary on their itineraries

Company	No. of Itineraries featuring Tipperary	Details
CIE Tours	9	These 9 itineraries involve a Visit to Rock of Cashel / photo opportunity.
	4	These 4 itineraries involve a Visit to Rock of Cashel / photo opportunity <u>and</u> a visit to Dualla House Farm, for scones, tea and watching dogs herd sheep.
	1	1 tour offers a Visit to Rock of Cashel / photo op. <u>and</u> also some time in the town.
Limerick Travel Offers same tours as CIE	9	These 9 itineraries involve a Visit to Rock of Cashel / photo op.
	4	These 4 itineraries involve a Visit to Rock of Cashel / photo opportunity <u>and</u> a visit to Dualla House Farm, for scones, tea and watching dogs herd sheep.
	1	1 tour offers a Visit to Rock of Cashel / photo opportunity <u>and</u> also some time in the town too.
	1 - Ancient East Tour	8 day tour – visits Cahir and Cashel Castles and says they overnight 1 night in Tipperary.
Moloney & Kelly	3	Offering visit to Rock and photo op only.
Alainn Tours	1	Offering visit to Cashel and Cahir castles and photo opps.
Irish Welcome Tours	4	2 offer visit to Rock and photo op only and 2 visit the Rock and the town of Cashel too.
Brendan Vacations Ireland	1	Offering visit to Rock and photo op only.
Hello Ireland Tours	1	Offering visit to Rock.
Vagabond Tours	7	7 itineraries visit Cashel – passing through – visit to Rock and photo op.
Specialised Ireland Tours	1	Visit Cashel – passing through – visit to Rock and photo op.
Shamrock Adventures	3	3 itineraries visit Cashel - passing through – visit to Rock and photo op.
Odyssey International		Large DMC so may do trips to visitor attractions in Tipperary if asked.
Into Ireland Travel		Do bespoke tours (pilgrimages, gardens etc) so would/could do Cashel.
Advantage ico		DMC, incentive & conference organiser so may do trips to visitor attractions in Tipperary if asked.
Joe O'Reilly Ireland Group		Longest established DMC & conference organiser in Ireland so may do trips to Tipp if asked.
Custom Ireland		DMC may do trips to visitor attractions in Tipperary if asked.
Wallace Travel Group		DMC may do trips to visitor attractions in Tipperary if asked.
Abbey Tours		One of largest TOs in the country - say they do a wide range but Tipperary not mentioned at all in any of their sample tours.
Premier Travel		DMC, incentive & conference organiser so may do trips to visitor attractions in Tipperary if asked.
Eirebus		DMC, incentive & conference organiser so may do trips to visitor attractions in Tipperary if asked.

7.8 Funding Sources

Fáilte Ireland's Capital Grant Scheme, New Ideas in Ancient Spaces offers grants for eligible projects from €10,000 to €200,000.

<http://www.Faillteireland.ie/Supports/Identify-Available-Funding/New-ideas-in-Ancient-Spaces-Small-Grants-Scheme.aspx>

The Arts Council offers annual grants of up to €20,000 for festivals and events

<http://www.artscouncil.ie/Funds/festivals-and-events-scheme/>

Business development loans are available from Microfinance Ireland

<https://www.localenterprise.ie/Tipperary/Financial-Supports/Microfinance-Ireland/>

Business specific training can be found through the Local Enterprise Office

<https://www.localenterprise.ie/Tipperary/Training-Events/Training/>

8. APPENDICES

Appendix 1:

Mystery Shop

A1. MYSTERY SHOP

The 'mystery shop' approach to testing products is well established across the retail and, at this stage, tourism sectors. In the process of developing a new tourism Plan for Tipperary, it was important to get a practical sense of the ability of key zones and areas within the county to deliver a good tourism experience. As a result, several days were spent 'mystery shopping' an agreed list of areas. This covered the following towns and the areas around them:

- | | |
|-------------------|------------------|
| • Carrick-on-Suir | • Tipperary Town |
| • Clonmel | • Roscrea |
| • Cahir | • Nenagh |
| • Cashel | • Thurles |

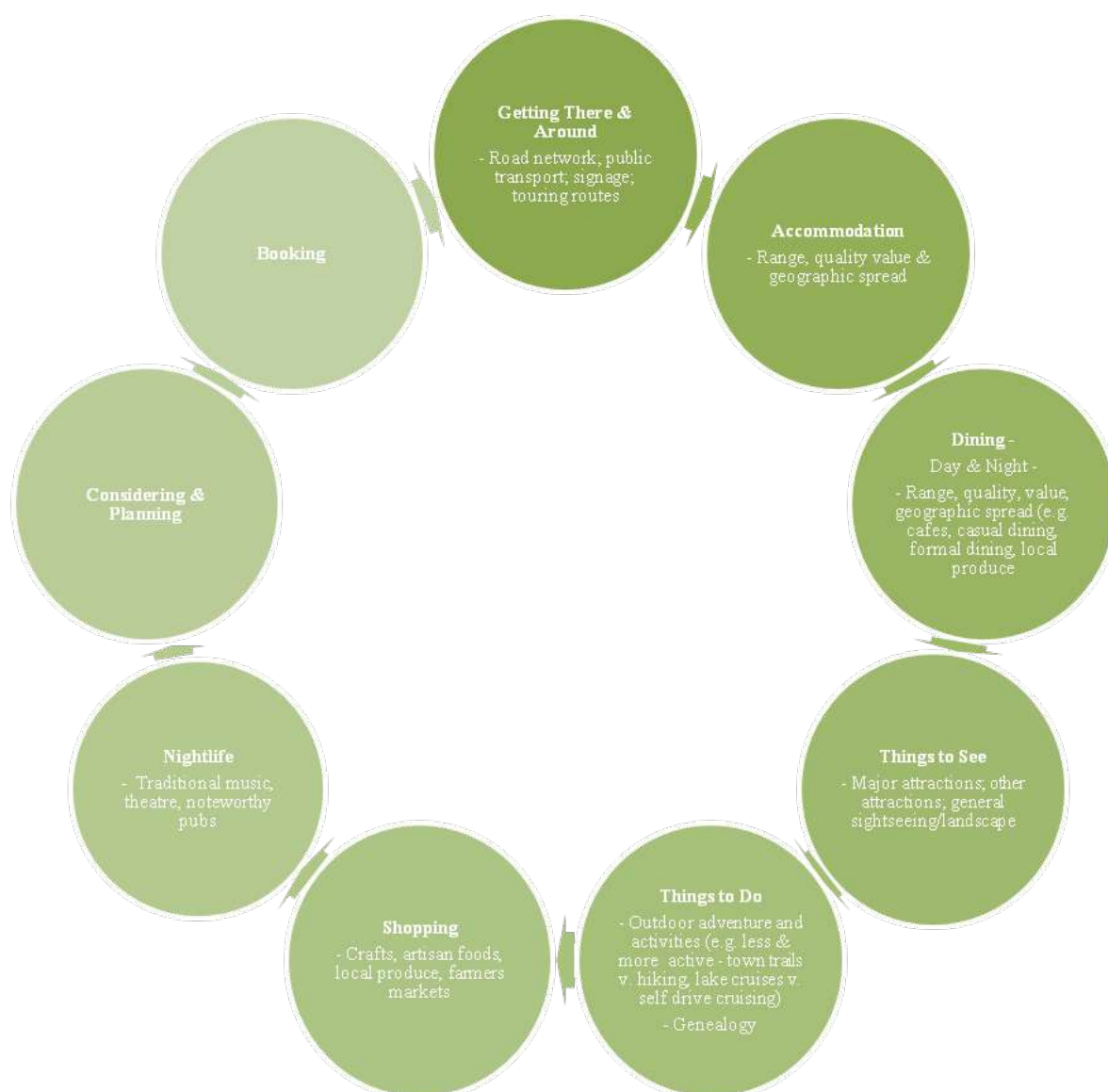
And, although this element of the project was limited due to budgetary and time constraints, it does provide relevant feedback that has been integrated into the overall review of the destination.

A destination needs to be assessed bearing in mind the main areas of relevance to the visitor. These represent aspects of the visitor's journey from the time they are considering a holiday to when they leave, as illustrated in Figure A1.1 overleaf. (The post-visit element has been eliminated as it's not felt to be hugely relevant in this case).

Each of these was taken into consideration when mystery shopping the destination, although some were grouped together - as listed below.

- 1) **Considering and Planning.** Most of the towns, areas and operators reviewed had good web presence. However, there was no consistency in terms of messaging or approach and some were out of date in terms of content and style. This last point is particularly important as some of the attractions and accommodation are listed across several web platforms and not all were up to date (e.g. Ormonde Castle and the Aherlow Hotel were not listed as closed on several subsidiary sites). The best example, in terms of an area website, was the Lough Derg Marketing Group.

Figure A1.1: Visitor 'Touch Points' Used to Assess Destination Tipperary



- 2) **Booking.** No difficulty was found in booking although there was some delay in responding from a couple of the small accommodation providers (two days, in one case).
- 3) **Getting There and Around.** Getting to the major towns by car was not difficult, given the good motorway and N road network, and the accompanying signage, and public transport to the northern part of the county is good. In addition, the main driving routes were easily navigable and well-signed. The Knockmealdown, Aherlow and Bianconi Drives were particularly visible. Once off the main roads, though, road

surfaces deteriorated considerably (particularly noticeable in Fethard and Upperchurch) and signage was at times absent or pointing in the wrong direction.

- 4) **Accommodation.** A summary of accommodation supply is provided in Section 3.2.2. In terms of the areas reviewed under the mystery shop, Clonmel had the most obvious supply and range of accommodation of the areas reviewed. Some of the providers are particularly visible through web searches: the larger hotels are all well-featured across the main sites (e.g. Tripadvisor, hotels.com) and some of the self-catering operators have good visibility too (e.g. Fuchsia Lane, Riverrun). In some cases, given the limited supply in certain specific areas, the quality of accommodation is an issue. It was also mentioned by operators in Cashel that additional capacity would encourage visitors to stay.
- 5) **Dining.** Tipperary clearly has a good base of artisan food produce, although it is not as visible as it could be, and all the main towns reviewed have a reasonable supply of daytime restaurants and cafés, many of which are catering to a wide variety of tastes and lifestyle choices. Some have a particular reputation for using Tipperary artisan produce and are worth travelling the extra distance for, e.g. Hickeys in Clonmel. There isn't as wide a variety of evening dining in most of the towns (unless the hotels are included), with Cahir and Cashel being the exceptions.
- 6) **Things to See and Do.** As with accommodation, both of these aspects have been described in Section 3.3. The scenery in both the southern and northern parts of the county is attractive, with the drives around Lough Derg and in and around Carrick, Clonmel, Cahir and Tipperary being particularly scenic. There is a plentiful supply of things to do and see in all the areas reviewed, with an abundance of historic sites within the towns, that are well-signed by the historic trails fingerposts and by the newer Butler Trail notices, and driving routes in the areas. Additionally, the towns themselves are attractions in their own right for visitors and therefore need to be reviewed as such. A brief snapshot of each is provided below:

Clonmel: The overall impression is a mixed one and Clonmel has the potential to be a tourism gateway/hub if certain factors are addressed. While there is good public realm and a selection of signed historic buildings, there are also shabby and/or closed premises on the main street and more care could be taken by retailers to ensure their shopfronts fit with the intention of presenting the town as an historic one.

The traffic management system is also a little confusing and more high-quality evening dining options, along with more interesting retail, would encourage overnight stays in the town.

Cahir: From a tourism perspective, Cahir has much of what is needed for a strong centre for tourism. It is easily accessed by car, pleasant to stroll around on foot (including the river walks), has a range of interesting attractions that are well-maintained and a good selection of daytime and evening dining options.

Carrick-on-Suir: This town was a surprising pleasure, given its lack of reputation as a tourism destination. There is good attention to public realm and appearance, with interesting retail and good daytime dining. The Heritage Centre, while currently operating on a shoestring (they had to turn the lights on for our reviewer), has some quirky and interesting artifacts, including silver Butler chalices from the 17th century, and could be much more interesting to visitors and could act as an orientation point with only a small injection of financial support necessary. The re-opening of Ormonde Castle will be an opportunity to reposition the town itself, if planned for (there was no indication on the gate of the Castle as to when it will be reopening).

Tipperary Town: After the promise of the website and the positive signage on entering the town, Tipperary Town does not encourage visitors to linger. Although there is heritage signage in place, and obviously places worth visiting, the overall tone of the town is shabby and the temptation therefore is to move on to another town instead. However, with attention to developing the tourism offering of the town, it has the potential to grow given its proximity to the attractive Glen of Aherlow and the touring and walking experiences there.

Fethard: As this town is the subject of other ongoing work, we will limit our comments to reiterating that the town is a small but attractive one with potential to develop as a day-trip destination for visitors in the area once it has developed its offering more as an historic walled town.

Cashel: With the Rock on its doorstep, this town is well-established as a tourism hub, with a reasonable selection of retail and dining in the town. The edges of the town would benefit from attention to create a more attractive proposition and it could maximise its current position by developing more as an orientation point to the

surrounding areas and by facilitating the utilisation of accommodation within a half hour's drive of the town.

Terryglass: Presents very pleasantly with good quality pubs for food and evening entertainment. There was evidence of attractive self catering accommodation (this was closed at the time of the visit) and there is some B&B accommodation. The lake side offering activity in winter is modest although at the time of the visit there was still some intrepid lake users in the water! During the summer season a good variety of water activities are available. The story of the abbey, founded by Columba of Terryglass, and the area's Christian heritage is an added element for those not active on the water, and the lake side walk itself is attractive and close to amenities.

Thurles: is a fairly large, busy town which felt like a hub for the wider area. There are some very nice local, authentic shops along side high street multiples. The central square is a busy thorough fair which had disadvantages in terms of orientation and way finding. It wasn't easy to locate the Thurles Cathedral for example of the Famine Museum. Orientation was helped by the River Suir which also highlighted the architecturally attractive arts centre, The Source, which was offering a good mixed programme of theatre, music and comedy. On the same site is the excellent Stef Hans restaurant which provided a very high quality, good value lunch in an attractive room next to the river. Just off the main square, the Gaelic games museum, Lar Na Pairc, is a worthwhile visit as there is frequent reference to GAA when researching a visit to Thurles on line. At the time of the visit there was nothing on at Semple Stadium, or Thurles Racecourse which is nearby, however it was noted that it would be an attractive option to have a live experience to compliment the stories being told in the museum. Overall Thurles, while easily accessible and well sign posted from the major road network, would benefit from upgrading its public realm and making the town more attractive to visitors in way finding and making links between sites. It has great potential as an overnight destination for exploring the excellent built and natural heritage nearby as it offers a strong night time offering through the arts centre, its bars and restaurants.

Upperchurch: is a gateway to the Slieve Felim mountains and environs as a walking destination. The location of the village is very lovely and although not far from Thurles in miles, feels like a million miles away. Signage from Thurles is somewhat confusing as the turn of from the R498 to the L3602 is not obvious. Signage on departure from

the far side of the village is weak with one sign which at the time of the visit was turned the wrong way. The countryside however is very attractive and the village is home to Jim O' the Mill, the centre of some of the island's best music sessions which would argue its place as an overnight destination and adds much to a 'culturally curious' itinerary.

Holycross: the offering at Holycross is interesting and attractive. It's very accessible from two major roads, the M8 & N62, and clearly signed. Even on a wet and grey day, the site is impressive as you enter the village. The chapel, which is still in use, is very atmospheric. The aesthetic overall is very nice but the interpretation is quite tired and would benefit from some upgrading.

Roscrea: has a good concentration of heritage offerings which are well documented and promoted online. The approaching signage indicates this also however directional signage could be clearer as you enter the town from the M7. The Castle and Damer House are well restored with attractive gardens which must be lovely in the spring and summer. There is a visitor centre and tours of the house are available. The remains of the 15th century Franciscan abbey and impressive St.Cronan's Church and graveyard which rises up away from the town. Elsewhere in the town other heritage sites which are not easily linked by way finding and signage is unclear. There is some navigational information at the castle but it is worn and weathered. The town has a good range for shopping and a welcome absence of multiplies on the main streets which made for a unique, authentic visit. There are several options for food from café style eating to hotel and pub grub.

Nenagh: is a very pleasant town to walk around; its layout conducive to a stroll for a visitor. Signage and navigation approaching the town were good although like Roscrea it would have been of benefit to have a central orientation point with a 'key' to experiencing the town. Following an excellent lunch at a café foregrounding local produce, an easy fifteen minute walk through town to the Nenagh Heritage Centre was a nice way to get a sense of place. The 19th century goal, which is home to the Centre, is an impressive building with an attractive approach which gave the visit some ceremony. The collection, set across two upper floors and the basement is made up of objects and images which reflect life in rural Ireland in the 19th and early 20th centuries. Interpretation of the collection would benefit from upgrading, particularly in how objects are presented and labeled to allow them to be fully

appreciated, as there is genuine charm in the collection and the appropriateness of a small but authentic collection of rural Ireland living being available in a market town like Nenagh was not lost. Our reviewer received a really enthusiastic response from Centre staff and a very informative but unobtrusive introduction to my visit. Attracted by the impressive church set amongst grounds across from the gaol our reviewer made a loop walk back around the town which went past Nenagh Arts Centre, a very nice facility with a good programme of evening performances.

Table A1.1: Mystery Shop Rating Grid

ASPECT TO BE RATED Rating 1 - 5: Very Weak - Very Strong	Carrick-on-Suir	Clonmel	Cahir	Cashel	Tipperary	Roscrea	Nenagh	Thurles
Pre-Visit Online Visibility	3	3	4	4	4	3	3	3
Access	4	5	4	5	4	4	4	4
Getting Around	4	3	5	4	4	3	4	4
Signage and Way-Finding	4	4	5	4	4	3	4	3
Public Realm	4	4	4	4	3	3	3	2
Attractiveness	4	3	4	4	2	4	4	2
Availability of Driving Routes	4	4	4	4	4	4	4	4
Accommodation - Variety	3	4	2	3	3	3	3	3
Accommodation - Quality	3	4	2	3	3	3	3	3
Availability of Plenty to See (free)	4	3	3	3	3	3	3	2
Availability of Plenty to See (paid)	4	3	4	4	3	3	3	2
Availability of Plenty to Do (free)	4	4	3	3	4	3	3	4
Availability of Plenty to Do (paid)	3	3	4	3	3	3	3	4
Tourism-Relevant Shopping (crafts/foods)	4	3	3	4	3	3	4	3
Daytime Dining	4	4	4	4	3	3	4	4
Evening Dining	3	3	4	4	3	3	3	4
Entertainment	3	3	2	4	3	2	2	3
Landscape	4	4	4	4	4	4	4	4
Fit with Domestic Family Market	3	3	4	4	3	3	3	3
Fit with Domestic Social Energisers	2	3	2	2	3	2	2	2
Fit with Overseas Culturally Curious	4	3	5	5	2	4	3	4
Fit with Overseas Great Escapers	4	3	5	5	3	4	4	3

Appendix 2:

Comparative Tourism Destinations Management Organisations

A2. COMPARATIVE TOURISM DESTINATIONS MANAGEMENT ORGANISATIONS

Several destinations, within Ireland as well as overseas, were considered in seeking comparator destinations that might provide a useful benchmark with Tipperary. Eventually, three overseas examples were selected on the basis that they share certain characteristics with Tipperary.

A) **Cumbria Tourism** is the official destination management organisation for the Lake District, Cumbria, an area renowned for its inland, natural tourism offering that hinges on outdoor pursuits on land and lake.

“The Lake District and Cumbria has strengths and weaknesses. Its outstanding scenic quality and reputation together with ‘free’ experiences (outdoors, culture and heritage, rest and relaxation) have made it a consumer favourite. At the same time it is perceived as an ‘expensive’ and mature destination with mixed weather and poor connections (both physical and digital!).”⁶

However, in addition to the world-famous natural environment, Cumbria has many towns and villages to explore and in the central Lakes, the towns of Kendal, Windermere, Ambleside and Grasmere are promoted as bases from which to explore the surrounding countryside. Each of these towns has its own distinct character. Windermere, for example, excels as a base for water activities on the lake while Grasmere has long-standing cultural connections. However, each one of them is tourism-focused, providing a hub of accommodation, dining and supports for active visitors, as well as being orientation points for the area.

While its core offering is similar to Tipperary, the scale of it is obviously not - with six million visitors annually (and 35.6 million day trippers) and a well-resourced tourism organisation.

Cumbria Tourism is funded predominantly from a combination of commercial income and membership subscriptions, although a variety of grants provide additional income. Membership of the organisation is open to a wide range of interests including

⁶ Cumbria DMP Summary

accommodation, non-accommodation, supplier, corporate and community. Cumbria Tourism has a strong marketing focus, with clever use of online channels. It offers various marketing 'bundles' to its members, including Social Media Post, Solus Enewsletter, Digital Bundles One, Two and Three. They range in price from £50 to £1,950 Custom marketing packages can also be arranged. It also makes clever use of other attention-grabbing opportunities, such as the in-situ artwork below, which



attracted considerable coverage through the circulation of visitor online photographs.

(Paper Bridge by Steve Messam, commissioned by Lakes Culture)

“The Lake District has a long and important history in shaping the way we look at and appreciate landscapes.”⁷

Public-facing marketing activities include:

- the golakes.com reservations and information website;
- the MyCumbria residents' benefits card;
- the Lakes Culture initiative, aimed at establishing the Lake District as the leading rural Cultural Destination in the UK;
- TASTECumbria which is focused on building supply chains and promoting the use of Herdwick meat within the hospitality industry.

B) The Heart of Devon Tourism Partnership is a local membership organisation for the areas of East and Mid Devon and Exeter (there are six area partnerships in

⁷ <http://www.chroniclelive.co.uk/news/north-east-news/county-durham-artist-steve-messam-9234678>

Devon). It is a non-profit company led by a private/public partnership and membership is open to all types of leisure and tourism businesses. It currently has around 300 members. In addition to the standard membership benefits, Heart of Devon also offers three upgrade website packages: Bronze, Silver and Gold, ranging from £120 to £350.

Representing a relatively confined geographic area, Heart of Devon is selective in the themes it focuses on each year. For example, in 2015 the focus was on activity holidays, events, food and drink, and rugby (the Rugby Weekenders was developed to encourage fans to extend their stay in the region when visiting for a match at Sandy Park). In addition to more mainstream tourism activities, however, the organisation has also been experimenting with other events such as Sindy's 50th Anniversary in 2013 (the doll was manufactured in Exeter).



Apart from the natural appeal of the area, Devon Cream Teas are promoted as a tourism 'highlight', and served either traditionally or with a modern twist by a wide range of tourism providers.

The website features a broad range of tourism and tourism-related information, including details on shopping, food & drink, weddings and group travel.

- C) **Gold of Lapland** (Guldriket), Sweden is a destination and marketing organisation promoting an area of Swedish Lapland that is about an hour's flight from Stockholm and is known for gold mining - a theme now picked up by a variety of tourism providers (including family-friendly 'mining' activities). Although snow-related activities are naturally a core offering in the area in the winter, it promotes a broad

range of outdoor activities that make the most of the natural environment, from action adventure to nature discovery and gold panning.

Unlike other rural destinations that emphasise the proximity of towns and villages that can be used as bases, Gold of Lapland promotes nature-immersion as the holiday offering - with rural cabins and experiences available throughout the area and the clear message that nature is the key attraction. The 'body and soul' experiences are likewise nature-based.



The organisation is jointly owned by its more than 85 members and membership is open to a broad range of tourism and non-tourism businesses, with a single membership fee and ongoing service fees based on annual turnover.

- D) **Ireland.** Although no single destination in Ireland stands out as offering an interesting comparison with Tipperary for the purposes of benchmarking, there are still examples of good practice in a variety of places around the country.

Mayo Greenway, take a trip on the Mayo Greenway from Westport to Achill and you will find a very cohesive offering. The bike sellers recommend the café to take a break at; the local bus and taxi drivers are on call to return you should the cycle get too much; and the hotels, pre-promoted through the planning sites, are serving up the

mussels from the fish shop you just cycled by along with other local produce that is clearly identified as such on the menu. The area is a fine example of collaboration across all aspects of the visitor experience.

West Cork, although offering a coastal tourism experience to visitors, is a leader in terms of reputation for artisan foods, with its 'A Taste of West Cork' Fuchsia brand - well-established at this stage. Initially an initiative of West Cork Leader in 1998 and incorporating tourism and craft as well as food, the Fuchsia has become synonymous with local food produce. It is an excellent example of how a regional initiative, with regional support, using a logo based on a local 'emblem', has become established in the domestic consumer mind as an indicator of authenticity and quality.

Lough Derg Partnership. Acknowledging that there are greater opportunities for amenities at Lough Derg, the RoadMap is an excellent example of local resident representation working with diverse County Councils and Fáilte Ireland to bring together a set of objectives and actions that will enhance enjoyment of Lough Derg and increase visitor numbers. It looks at clever ways to incorporate niche interest alongside more main stream activities that are grounded in environmental responsibility and promoted through a clear, focused, website.

A2.1 Conclusions

Looking across both the destinations mentioned above, as well as others, a number of examples of good practice appear that are useful for Tipperary to learn from. These include the eight points summarised below.

- 1) **A partnership approach** may take time to establish but when it works, it delivers the best results by ensuring relevant agencies and businesses are aligned to deliver on strategic and practical aims. Partners include public bodies (regional authorities, local enterprise agencies and others that can deliver on infrastructure, etc.), the business community (retail, etc.), cultural agencies, sporting agencies, food/drink representatives, as well as tourism operators. Partners vary according to the needs of the destination.
- 2) **Local communities are actively involved** - they both help to create the 'sense of place' for which visitors seek destinations such as Ireland as well as providing volunteers for local projects. The Cumbrian MyCumbria card initiative is a good

example of how residents can be both 'rewarded' and encouraged to become local ambassadors.

- 3) **Tourism and non-tourism 'products' are fully integrated** at an organisational level (e.g. positions on the destination organisation board), through marketing activities and in delivering the experiences.
- 4) **A focus on key themes** allows limited resources to be channeled where they will make the greatest difference. Raising the bar in a few select areas can raise the profile of a destination overall, creating opportunities for everyone.
- 5) **Value for money membership packages** with basic and upgrade options encourages buy-in from the smaller and larger enterprises as well as providing a vehicle through which a tourism company can refine its support and marketing activities to meet the needs of different operators.
- 6) A thorough and **detailed database** is a pre-requisite for any destination management organisation (DMO) that aims to be an interface between consumers and tourism businesses. This can be done either through collecting the relevant data directly or by getting a live feed from a suitable source. Databases typically include primary tourism 'products' (accommodation, activities, attractions) as well as other tourism-related 'products' (entertainment, shopping, transport, dining, events, etc.).
- 7) The best DMOs make **full use of the internet and online opportunities** by providing an attractive website, ensuring an ongoing stream of current material (e.g. blogs, social media, imagery) and providing/facilitating a booking facility (either directly, through the site, or by linking out).
- 8) It is common now to adopt **a segmented approach to consumers** by offering suggested itineraries, bookable packages, ad-hoc activities, etc., that would appeal to family, sports fans, annual events (Valentines/Mothers Day) and so on.

Appendix 3:

Tipperary Membership Package

A3. TIPPERARY MEMBERSHIP PACKAGE

Overview

Tipperary Tourism offers a range of trade support and county marketing activities that present the county's tourism products and activities to target consumers in Ireland and overseas. Tourism and tourism-related businesses⁸ can benefit from these directly by becoming a Member of Tipperary Tourism, thereby supporting all of us involved in developing Tipperary as a top tourism destination.

There are a number of different membership levels available, tailored to suit differing needs as well as availability of time and other resources. There is also an opportunity, for non-tourism businesses, to participate by becoming a Friend.

Tipperary Tourism - Basic Marketing Membership

This package is for those who want to be included in Tipperary Tourism's basic marketing platforms but don't have the need or resources to be more actively involved in other activities.

By opting for a Basic Marketing Membership, your business will benefit from the following activities undertaken by Tipperary Tourism.

- A listing with contact details in relevant annual publications (e.g. county guide).
- A listing on the website⁹ with photograph, brief description, contact details and a link to one business website.
- An invitation to the annual tourism conference.
- Inclusion on journalist itineraries, as relevant.
- Inclusion on tour operator familiarisation trips, as relevant.
- Receive regular Tipperary Tourism newsletters and bulletins.
- An opportunity to participate in mentoring and training (excluding networking and trade familiarisation programmes, which are included in the Active Participation Membership).

⁸ Accommodation providers must be listed/approved/registered with Fáilte Ireland in order to participate. Activity providers must have appropriate insurance and be affiliated with a national governing body or equivalent (e.g. AIRE for equestrian centres) that provide quality assurance for consumers.

⁹ 'The website' indicates www.tipperary.com

Cost: €75

Tipperary Tourism - Active Participation Membership

This package is for those who would like the opportunity to more actively take part in Tipperary Tourism's year-round promotions in Ireland and overseas. By choosing to be an Active Participation Member, your business will benefit from the following activities undertaken by Tipperary Tourism.

- All the benefits of the Basic Marketing Membership.
- Invitations to participate in networking events and Tipperary trade familiarisation programmes.
- Invitations to participate in planned promotions in Ireland and overseas (subject to additional, though subsidised, participation fees).
- Inclusion in rolling gallery of images on the relevant landing pages of the website, e.g. 'Experience', 'Stay'.
- Inclusion in direct marketing campaigns to consumers, e.g. ezines.

Costs: €150

Tipperary Tourism - Full Membership

This package is for those who are keen to be full participants in the direction in which Tipperary Tourism takes and who are in a position to respond to ad-hoc opportunities that need a swift response.

By choosing to be a Full Member, your business will benefit from the following activities undertaken by Tipperary Tourism.

Benefits:

- All the benefits of the Active Participation Membership.
- Invitations to co-operate in short-term/seasonal bundles.
- Invitations to participate in responsive marketing activities, e.g. opportunistic promotions that capitalise on unexpected publicity, weather/currency changes, etc., and other unplanned activities that require a quick turnaround.
- Inclusion in the gallery of images presented on the main page of the website.

Costs: €250

Friend of Tipperary Tourism

This is a special category for non-tourism businesses that recognise the value tourism brings to the county as a whole and wish to lend their support to the marketing of the county as a tourism destination. In return for support, Friends will participate in a rolling banner ad campaign on the Tipperary Tourism website and receive regular Tipperary Tourism newsletters and bulletins.

Costs: €75

Appendix 4:

Active Community Tourism Groups

A4. ACTIVE COMMUNITY TOURISM GROUPS

Fethard Business and Tourism Group
Carrick on Suir Tourism and Economic Committee
Glen of Aherlow Failte Society
Cashel Tourism and Heritage Group
TIRD - Tipperary Town
Tidy Towns Groups accross the County (71 approx)
Upperchurch Drombane Dev Association
Clancy Festival Group, Carrick on Suir
Junction Festival, Clonmel
Suir Valley 3 Day Cycling Festival
Festival Cluain Meala
Clonmel Busking Festival
Tipperary Churn Rolling Festival
Cahir Develeopment Association & Tidy Towns
Thurles Festival of Sport
Slieveardagh Rural Development (Ecclesiatical Trail)
Holycross Community Network
SOLD – Save our Lough Derg – Joe O’Donoghue
Lough Derg Science Group
Lough Derg Anglers Assoc.
Killaloe Ballina
Dromineer Dev. Assoc
Terryglass /Kilbarron Enterprise Group
Knockmeldown Active
Galtee Steering group

Appendix 5:

Tipperary Tourism Plan Consultation List

A5. TIPPERARY TOURISM PLAN CONSULTATION LIST

No.	Name	Surname	Organisation
1	Colm	Breheny	Fáilte Ireland
2	Ruairi	Deane	Project Manager, Ireland's Ancient East
3	Mairead	English Maher	Local Enterprise Office Food Strategy
4	Terry	Flynn	Terry Flynn Tours
5	Rita	Guinan	Head of L.E.O.
6	Andrew	Hogan	Tipperary Racecourse
7	Eoin	Little	Lakeside Hotel
8	Kira	Makela	Tour Wise Ireland
9	Joe	McGrath	Chief Executive, Tipperary County Council
10	Elaine	Moriarty	Office of Public Works
11	Roisin	O'Grady	Heritage Officer, Tipperary County Council
12	Zoe	Redmond	Tourism Ireland
13	Matt	Ryan	Community Rep. - North Tipperary Leader
14	Melanie	Scott	Arts Officer, Tipperary County Council

Appendix 6:

Tipperary Tourism Development Trade Workshop Attendees

A6. TIPPERARY TOURISM TRADE WORKSHOP ATTENDEES

Abbey Court Hotel, Nenagh, 14th December 2015			
No.	Name	Surname	Organisation
1	Theresa	Bourke	Fiddlers Retreat
2	Paul	Burke	Irish Fishing Tours
3	Declan	Collison	The Lake Café
4	John	Egan	Rural Recreation Officer, Sth. Tipperary Development Company
5	Pa	Finucane	Cloughjordan Eco Village / Django's Hostel
6	Tom	Grace	Cabragh Wetlands
7	Niall	Heenan	Fuchsia Cottages
8	Mike	Jones	My Next Adventure
9	Seamus	King	Lár na Páirce
10	Joan	McGowan	Fairways Bar & Restaurant
11	Tom	McKeogh	Willowbrook B&B
12	Matt	Muller	Abbey Court Hotel
13	Marie	O'Sullivan	Art and Healing Centre
14	Marie	Phelan	Tipperary Tourism / County Council
15	Tom	Pollard	Caravantasia
16	Cathal	Quinn	Ring of Lough Derg / Flanagan's
17	Jacinta	Rigney	Roscrea Castle
18	Mairead	Tierney	Riverrun self-catering
	James	Whelan	Spirit of Killaloe River Cruises
Hotel Minella, Clonmel, 15th December 2015			
No.	Name	Surname	Organisation
1	Eavan	Carmody	Killenure Castle
2	Terry	Cunningham	Fethard 'Back to the Walls' walking tour
3	Terry	Flynn	Terry Flynn Tours
4	Helen	Morrissey	Aherlow Walks
5	John	Noonan	Parsons Green
6	Kevin	O'Donnell	Kilmaneen B&B
7	Shane	O'Keeffe	OK Cycle & Sports
8	Helen	Shanahan	The Craft Granary
9	Frank	Walsh	Kilkieran Cottages
10	Frank		Celtic Planetarium

Appendix 7:

Tipperary Tourism Development Plan Public Consultations Attendees

A7. TIPPERARY TOURISM DEVELOPMENT PLAN PUBLIC CONSULTATIONS ATTENDEES

Hotel Minella Attendees			
No.	Name	Surname	Organisation
1	Cllr. Siobhan	Ambrose	Tipperary County Council
2	Ann Marie	Breen	Association of Clonmel Traders
3	Mary	Carey Ryan	Slieve Felim Grouse Conservation
4	Alex	Casey	Clonmel Golf Club
5	Margaret	Coskeran	Tipperary Heritage Group
6	Brigid	Dillon	STDC
7	Tony	Egan	Association of Clonmel Traders
8	Mairead	English Maher	Tipperary Food Producers & Tipperary County Council
9	Cllr John	Fahey	MCC / Tipperary County Council
10	Liam	Fleming	Clogheen Community Council
11	Sarah	Furne	Cashel Farmhouse Cheesemongers
12	Sylvia	Greene	Tipperary Town Heritage Group
13	Louis	Grubb	Cashel Farmhouse Cheesemongers
14	Maire	Hennessy	Moloney & Kelly Travel
15	Frank	Kelly	Stately Ways
16	Aisling	Kilroy	The Narrow Space Gallery
17	Eamonn	Long	Rathellen House / Aherlow Failte
18	Bernard	Minogue	Cashel Folk Village
19	Tracy	Minogue	Cashel Folk Village
20	Cllr. Marie	Murphy	Tipperary County Council
21	Cllr. Michael	Murphy	Tipperary County Council
22	Elizabeth	Nallen	Hotel Minella
23	John	Noonan	Parsons Green
24	Will	Nugent	Ardfinnan Canoe Club
25	Ronan	O'Brien	Bru Boru
26	Kevin	O'Donnell	Kilmaneen B&B
27	James	O'Donoghue	Long Ways Cider Company
28	Cathal	O'Donoghue	Speciality Ireland
29	Margaret	O'Grady	
30	Edward	O'Sullivan	Tipperary Country Cottages
31	Jane	Ryan	Tipperary Tourism Company
32	Mark	Rylands	Knockmealdown Active
33	Ade	Walsh	Kilkieran Cottage Restaurant
Abbey Court Hotel Attendees			
No.	Name	Surname	Organisation
1	Pierce	Duggan	The Castle B&B
2	Ailbhe	Gerrard	Brookfield Farm
3	Rita	Guinan	Tipperary County Council
4	Joe	MacGrath	Tipperary County Council
5	Marie	Maher	Tipperary County Council
6	Todd	McNamara	Mc Namaras Cottages
7	Aine	McCarthy	Tipperary County Council
8	Lisa	McGee	Social Media Consultant
9	Tom & Tricia	McKeogh	Willowbrook B&B
10	Mark	Molloy	Crossogue House
11	Luke	Murtagh	Tipperary Tourism Company
12	Eamonn	O'Toole	Self Catering Accommodation
13	Marie	Phelan	Tipperary County Council
14	John	Rice	Glance Promotions
15	Cllr. Mattie	Ryan	Tipperary County Council
16	Una	Ryan	Tipperary Tourism Company
17	Matt	Ryan	Slieve Felim / Beara Breifne Way
18	Keith	Stanley	Streamstown Caravan Park Reserve
19	Charles	Stanley-Smith	LCDC
20	Kevin	Whelan	Nenagh Walking Tours



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