



Guiding our Journey to a  
Vibrant **New Future** in Tourism  
County Clare Tourism Strategy 2030





## *THE SOUND OF STONE*

*Come a little closer  
and feel the pulse  
of this perfumed earth,  
and the heartbeat  
of these ancient stones.*

*Stand in the silence  
and listen to the music  
that floats in the still air.*

*It is the sound  
of the stones singing.*

P.J. CURTIS

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# Foreword



**Pat Dowling**  
Chief Executive  
Clare County Council

## County Clare Tourism Strategy 2030

### Guiding our Journey to a Vibrant New Future in Tourism

During 2019, when we set about the work of shaping a ten-year strategy to chart the future of tourism in County Clare, our objectives were clear. In partnership with Shannon Heritage, Shannon Group and Fáilte Ireland, we wished to ensure the continued growth of tourism in the County by adding to its appeal to both overseas and domestic visitors, and to do so in a sustainable way – managing and dispersing growth so that communities in all parts of Clare benefitted.

As we prepared to sign-off on the strategy, the COVID-19 pandemic unleashed a massive economic shock on the world. It brought a sudden stop to international travel and tourism and it also deeply impacted domestic tourism within Ireland. The effect on businesses in Clare, and particularly tourism-connected businesses, has been devastating.

Given the unprecedented scale of the crisis in our tourism economy, an immediate priority was, and continues to be, to help minimise the impact of the downturn on businesses and to work toward full recovery. This essential work will be a focus of Clare County Council and the Clare Tourism Strategy Implementation Structure.

While there continues to be some business uncertainty, what is certain is that there is an unquenchable desire among people throughout the world to travel and to explore. Travel will resume when people feel it is safe to do so, and tourism will continue to be a key driver of our economic growth. Having a long-term strategy is now more important than ever.

This County Clare Tourism Strategy 2030 is intended to guide our journey to a vibrant new future in tourism. Our 2030 vision is for Clare to be a globally-renowned sustainable and vibrant destination, easily reached and traversed, and recognised for its rich cultural assets, its stunning and open-space landscapes, its compelling array of remarkable experiences, and for its welcome and exceptional hospitality.

Achieving this vision will require all tourism interests in Clare, supported by government and national agencies, to work collaboratively to deliver an outcome that enriches all communities across our County. Clare County Council is committed to driving this Strategy in partnership with the Tourism Industry and to the implementation of many of the actions set out within it.



**Councillor Mary Howard**  
Cathaoirleach  
Clare County Council

As the first citizen of Clare, I would like to commend the members of the County Clare Tourism Strategy 2030 Steering Group for shaping the broad strategy that will help guide tourism in the County through recovery and then to growth during the next decade and beyond. Special thanks goes to TEAM Tourism Consulting for facilitating the process under the direction of Jennifer Houillebecq. I also wish to acknowledge all of the stakeholders who inputted into this process.

Tourism is critical to the social and economic well-being of every part of Clare. When tourism thrives, every town, village, and community in the County experience the benefits.

Before the COVID-19 pandemic brought a sudden and catastrophic global halt to travel, it is estimated that the tourism sector supported over 6,600 jobs throughout the County. It is therefore essential that every effort is made to bring about tourism's recovery and to support the businesses that are affected now and during their journey back to growth.

While the recovery efforts are underway, devising sustainable longer-term approaches to tourism development is imperative. We want to attract more visitors to Clare into the future and spread the benefits of tourism across the County in a way that enriches our communities while, at the same time, maintaining our distinctive identity and protecting our natural environment. The Clare Tourism Strategy 2030 aims to achieve this.

The Elected members of Clare County are committed to playing a leadership role in facilitating the delivery of this Strategy and we encourage all agencies, communities, and tourism-connected businesses to help drive it forward.

Finally, I wish to acknowledge my predecessor, Cllr Clare Colleran Molloy, for her support in the preparation of this Strategy during her time in office.

# Preface

**This Strategy was prepared in 2019 and completed as a draft in early 2020. Between completion of the draft and its launch, the world plunged into crisis.**

**In spring 2020 the tourism ‘ecosystem’ changed in an unprecedented manner and experienced global collapse in a matter of days. The shock waves have reverberated across County Clare and the entire country as all activities relating to travel and tourism ground to an abrupt halt. The severity of the impact arising from the Covid-19 pandemic has been felt more within tourism than any other economic sector. Today destinations everywhere are now entirely focused on how to respond to the new realities of a situation that has shaken up virtually all our underlying assumptions about growth.**

So, is this Strategy still relevant? Can it still be regarded as the roadmap for the next ten years? The answer, in both cases, is ‘yes’.

On first reflection, this might seem surprising. Without a doubt our initial priorities in the recovery phase will be all about restarting an industry that ground to a halt and had to close its doors. This process of reopening will have to deal with a ‘new normal’. New business operating protocols, new visitor expectations, significantly down-sized capacities, and the need to work with businesses across the county to determine how to move forward in a viable manner. Our focus in this initial phase will be entirely on the domestic market. We realise that how our visitors travel to Clare will have changed, and issues of capacity management that seemed so challenging at the beginning of the year, are for now, in the rear-view mirror.

And yet, the Strategy remains highly relevant and largely unaltered. While its launch has been delayed, it has not been postponed or cancelled. Some might wonder why? Essentially, its relevance arises from how it was developed. Our aspirations and our value systems lie at its core and have carefully shaped the vision, the goals and the strategic priorities. The operating context may have changed and the growth that we anticipated short-term may have evaporated, but our values and aspirations have not. The ‘story’ of Clare and its underlying essence that differentiates it as a destination remain intact. The ‘fundamentals for success’ – *working collaboratively; elevating the principles of sustainability; strengthening local aspirations; adding value to the offer; and pursuing innovation and connectivity* – remain the ‘fundamentals for success’. At a tactical level, priorities will have shifted; but, at a strategic level, the focus has not.

In recognising the urgent need to identify immediate priorities, and to look at what is important in the next twelve to twenty-four months, the first action plan will be prepared. This **Destination Recovery and Strategy Action Plan** will address the immediate challenge of how to reopen Clare as a destination, while identifying steps that can be taken to commence implementation of the Strategy itself. There are many new practicalities that will need to be given consideration by residents, businesses and communities as we begin to welcome domestic visitors to Clare, and our approach will align with the new guidelines that Fáilte Ireland has provided on how to address these within a recovery plan.

Without a doubt, the work on developing the Strategy has strengthened our position at this time of intense uncertainty. The recommendation to establish a county-wide Tourism Advisory Forum will provide the leadership structure that will be critical in taking us forward and inspiring collaboration. This Forum will be well placed to provide a coordinated approach to recovery, and will have a first-hand understanding of the challenges that will need to be addressed across the county. Indeed, the timing for establishing this new leadership structure is particularly fortuitous.

Internally, the County Council is committed to enhancing staff resources in tourism and cross-departmental dialogue – steps again that will be particularly important to rebuilding the tourism industry.

In the early days of recovery, our visitors will be looking for experiences where they can stay safe, feel healthy, and recharge after the anxieties of the Covid-19 lockdown. The need for an emphasis on health, safety and social distancing protocols could be a new norm, and will certainly be with us for some time. **Our invitation to discover Clare and our promise to feel vibrant are particularly fitting to the immediate market context.** Our trails and inland waterways, our majestic cliffs and distinctive landscapes, our beaches and golf courses, our ancient and medieval sites and stories, our smaller towns and villages – all provide a backdrop and an opportunity for visitors to find an experience that can enhance their sense of well-being and enable them to feel safe. Our communities will play a vital role in providing a safe welcome and in highlighting local places to discover. Our early visitors are likely to stay longer in one place, and if we enable them to truly *discover Clare* and *feel vibrant* they will be our ambassadors and will sow further seeds of recovery.

As is often said, within every crisis there is opportunity. Today this is no different. Covid-19 has had a traumatic impact on each one of us, and yet it is as if a reset button has been hit. We certainly have to focus on getting businesses open and viable again, but at the same time we have a unique opportunity to engage in sharper thinking. This Strategy is all about the need to work smartly to be competitive and to be at the forefront of sustainability and innovation. It offers an approach to destination development that is based on resilience. The timeline on implementation of the different strategic priorities may have shifted slightly – forward for some, and longer-term for others – but regardless, the priorities and actions outlined in this document remain highly relevant as we look to the next ten years

The **Action Plans** that will guide our immediate activities at any given time will ensure that the Strategy remains highly relevant and responsive to new opportunities and challenges, and that our *fundamentals for success* remain at the core of what we do and aspire to. These Action Plans offer the opportunity to set shorter-term measurable objectives and will play an important role in ensuring that we ultimately realise our 2030 vision and achieve the goals presented in this Strategy.



# Executive Summary

**This ten-year Strategy establishes a vision for the development of tourism in County Clare. It was prepared following an extensive period of consultation with the tourism industry and communities, a comprehensive review of the policy context and an in-depth assessment of the county as a destination. While the Strategy was prepared for Clare County Council, it is designed to be a road-map for all businesses, communities, and government partners and agencies, and the success of its implementation will be dependent on a collaborative approach.**

**The aspirations of the entire spectrum of stakeholders have shaped the goals and the strategic priorities, and the grass-roots commitment to sustainability that already exists is core to these priorities. The actions outlined are designed to differentiate Clare in the marketplace on the basis of its ‘story’, and to raise its profile as a leading destination in innovation and all aspects of destination development and tourism management. This Strategy provides a new paradigm for working together and represents a bold commitment to making a difference.**

## THE CURRENT SITUATION

A comprehensive assessment of the current situation has informed this Strategy and has provided the context for its strategic direction and the rationale for its implementation.

Tourism is regarded as one of Ireland’s most important economic sectors and key to dispersing wealth into the rural economy and smaller towns. Within County Clare the industry generated €244 million in 2018 and supported approximately 6,600 tourism jobs, and the sector is positioned as core to Clare County Council’s vision. A review of the industry’s performance highlights the appeal that Clare has for the international markets – reflected in its 5<sup>th</sup> ranking among all counties in 2017. In total, 8% of all overseas visitors to Ireland spent time in Clare, and 5% of all domestic trips are based in the county.

In 2018, County Clare was named by Frommer’s as one of the world’s Best Places to Go – stating that *“The rugged western coast of Ireland isn’t just one of the best places to go in the world; it’s among the best in the galaxy”*. It is the county’s significant strengths in its exceptionally rich and diverse natural and cultural heritage that contribute to this endorsement. Its globally recognised landscapes and ecosystems; the iconic Cliffs of Moher; its varied coastline and inland waterways; its ‘ancient stones’ and historic relics of by-gone eras; its strong resource base for outdoor adventure; and its vibrant contemporary culture that remains firmly connected to its traditions of the past – all underlie this market appeal.

In addition to these natural and cultural assets, there is a strong policy context with a clear focus on developing tourism as a driver for economic development and rural diversification. The county benefits from excellent connectivity by air, road, rail and sea, and its geographical position vis-à-vis the Wild Atlantic Way and Ireland’s Hidden Heartlands. Macro market trends relating to the ongoing increase in demand for experiential travel and slow tourism, and the growth in niche sectors such as geotourism and wellness travel all hold promise for Clare and have a good fit with the local focus on sustainability and responsible tourism.

However, while there are significant strengths to leverage, the value of tourism for the county as a whole is considerably lower than its market size rankings given a low average spend per overseas visitor and a high level of seasonality, and the distinctly uneven geographic spread of benefits. Underlying issues, such as limited public transportation within the county, the growing dominance of Dublin International Airport, concerns regarding the accommodation sector, and gaps in community infrastructure are all curtailing the growth and sustainable development of tourism. A lack of clear identity in the marketplace and insufficient emphasis on collaboration across the county, particularly at a time when there is a heightened sense of competition as destinations become increasingly strategic in their approach to growth, have further compounded the vulnerabilities.

## THE STRATEGY OVERVIEW

**Our 2030 Vision:** *CLARE is a globally renowned sustainable and vibrant destination, recognised for its compelling array of adventure activities and its remarkable experiences portraying our rich culture-scape of age-old spirituality, power and influence; our contemporary vitality arising from our deep-rooted traditions in music, sport and innovation; our dynamic rural towns and villages where our hospitality excels – all set within our stunning backdrop of unique and varied living landscapes.*

### Our goals:

To work collaboratively:

1. To deliver compelling quality experiences that reflect and leverage our unique identity.
2. To be globally recognised as a sustainable destination.
3. To create a smart destination that reflects our strong commitment to sustainability, connectivity, innovation and new approaches to doing business.
4. To be regarded as ‘the gateway to the west’.
5. To spread the benefits of tourism across the county and throughout the seasons in a way that enriches our communities while maintaining our distinctive identity and the integrity of our landscapes.

## DISCOVER CLARE – FEEL VIBRANT

in a land that pulsates with the *heartbeat of ancient stones*

### Our promise:

To deliver experiences that leave our guests feeling VIBRANT

### Our fundamentals for success:

WORKING COLLABORATIVELY

ELEVATING THE PRINCIPLES OF SUSTAINABILITY

STRENGTHENING LOCAL ASPIRATIONS

ADDING VALUE TO THE OFFER

PURSUING INNOVATION AND CONNECTIVITY

**Our key markets** are the Culturally Curious, the Great Escapers, and the Social Energisers in mainland UK, France, Germany and the United States; Connected Families from within Ireland; and select product-based niche sectors.

Developing a more pronounced experiential approach is based on our deeper understanding of our own narrative – a narrative that provides a shared understanding of what Clare has to offer. Four experiential themes encapsulate what we can do best to make Clare stand out in the marketplace, and to deliver on our promise – themes that prevail across all of the county.

- Experience our HOLISTIC LANDSCAPES
- Explore our HIGH TOWERS AND HIGH POWERS
- Pursue our ADVENTURE AND FAMILY FUN
- Celebrate our CREATIVE VITALITY

These themes provide a creative framework that is used in the development of experiences.

## OUR STRATEGIC DIRECTIONS

Our strategic priorities are entirely focused on achieving our goals and ensuring that *CLARE is a globally renowned sustainable and vibrant destination, recognised for its compelling array of remarkable ...experiences ... within our stunning backdrop of unique ... landscapes* – by 2030.

This is a ten-year Strategy that has been developed around five strategic directions that will work together to make Clare stand out, not just in the overseas marketplace, but as an exemplary rural destination in sustainability, leadership, and innovation.

### Strengthen leadership and collaboration

We aspire to a joined-up approach where we work together toward a common vision, using strong governance and collaboration as a means of ensuring that our ‘fundamentals for success’ are at the fore-front of our combined efforts to build a sustainable and competitive destination and industry.

### Strategic Priorities

1. Establish a county-wide Tourism Advisory Forum to strengthen governance and act as an advisory group for Clare County Council and a spokes-group for tourism.
2. Work towards positioning Clare as a destination to be recognised nationally and internationally for its commitment to responsible tourism and sustainability.
3. Develop new and strengthen existing approaches to generating integrated and cross-sectoral partnerships in tourism locally and regionally.
4. Continue to strengthen and support Clare County Council in its internal resources and capacity to develop and promote tourism.

### Improve connectivity

We aspire to improve all aspects of connectivity – from transportation to digital technologies and inclusivity, recognising that it is fundamental to enhancing the competitiveness of Clare as a destination.

#### Strategic Priorities

5. Work collaboratively with Shannon Airport to secure and sustain new routes that will improve air connectivity to the west of Ireland and increase air arrivals.
6. Explore the feasibility of attracting an appropriate segment of the cruise sector in a sustainable manner.
7. Develop and implement a public transportation strategy that addresses sustainable travel options designed to support tourism – focusing on enhancing connectivity between local destinations and providing visitors with viable mobility options.
8. Continue to work with local stakeholders to identify and address key traffic management concerns within north-west Clare (primarily the Geopark area).
9. Work with the Department of Transport, Tourism and Sport to promote timely completion of major transportation infrastructure projects and ancillary initiatives that have the capacity to strengthen tourism.
10. Work with partners at all levels to strengthen infrastructure and services that will enhance digital connectivity across the county.
11. Raise awareness and support for initiatives that will assist in creating a more accessible and inclusive destination.

### Build vibrant experiences

We aspire to deliver vibrant experiences that promote our experiential themes and differentiate Clare in the global marketplace.

#### Strategic Priorities

##### INTEGRATED PLANNING

12. Build a strong understanding of the positioning narrative and use this narrative as the framework for experience development.
13. Collaborate with Fáilte Ireland and the communities to advance the work that has already commenced on planning for visitor experience development.
14. Build the concept of sustainability firmly into ongoing planning processes for tourism and outdoor recreation.

##### TRAILS DEVELOPMENT

15. Prioritise the development of the West Clare Rail Greenway.
16. Develop a coordinated approach to the ongoing development and maintenance of the various trail network systems across Clare, including the four National Waymarked Trails.

##### THEMATIC EXPERIENCE DEVELOPMENT

17. Work collaboratively to support the development of theme-based experiences that align with the positioning narrative.

#### **Experience our HOLISTIC LANDSCAPES**

- a) Continue to elevate the international significance of the Burren and Cliffs of Moher UNESCO Global Geopark as a designated area renowned for distinctive geotourism experiences.

- b) Integrate the theme of geotourism across Clare, and use ecotourism to expand the offering.
- c) Strengthen the profile of wellness as a sector and well-being/vibrancy as the underlying promise to visitors that are looking to Discover Clare.

#### **Explore our HIGH TOWERS AND HIGH POWERS**

- d) Work with emerging initiatives that are focused on bringing together medieval and pilgrimage routes to tell a joined-up story.
- e) Implement existing plans and associated initiatives to raise the profile of iconic and supporting sites (such as the *Inis Cealtra Visitor Management and Sustainable Tourism Development Plan* and the *Bunratty Masterplan*).
- f) Undertake feasibility research and development work to strengthen the theme of High Towers and High Powers at other key sites and locations.

#### **Pursue our ADVENTURE AND FAMILY FUN**

- g) Focus on developing a strong spectrum of fresh water-based recreation experiences on Lough Derg, highlighting the Lower Lough Derg as a signature destination within Ireland's Hidden Heartlands area.
- h) Strengthen marine-based recreation through working with communities and activity sectors on projects designed to enhance the role of this sector locally and regionally.
- i) Continue to build a cycle-culture in Clare through working with local biking groups to raise the profile of different forms of biking and expand activity opportunities.

- j) Re-establish Clare as an angling destination through a multi-faceted approach to improve access to good angling opportunities.
- k) Continue to work collaboratively to leverage Clare’s world-class golf resorts and courses.
- l) Continue to work in partnership with special interest groups to attract sports events that will support Clare’s positioning as a destination for adventure and will highlight its range of land and water-based outdoor activities.

***Celebrate our CREATIVE VITALITY***

- m) Promote the ongoing development of Clare as the county of traditional music through supporting events and experiences that highlight this aspect of Clare’s culture.
- n) Work with communities across the county to support and develop existing and new festivals and events that highlight this creative vitality and *joie de vivre*.
- o) Support the ongoing development of arts and crafts.
- p) Highlight and capitalise on the county’s ‘heritage’ sports and stories of sporting significance.
- q) Work with food and drink producers and the culinary/hospitality sector to build food and local flavours as a key attractor in Clare.
- r) Celebrate the county’s innovative industrial heritage and its current areas of excellence in other economic sectors.
- s) Work towards developing craftsman experiences that focus on skills development in conservation and traditional building.

**Enhance supporting infrastructure and knowledge**

We aspire to support the sustainable growth of tourism in Clare through promoting, encouraging and facilitating the development of supporting infrastructure, and working collectively to enhance the critical knowledge base of the industry and all partners.

**Strategic Priorities**

**SUPPORTING INFRASTRUCTURE**

- 18. Undertake a comprehensive assessment of hotel and visitor accommodation and develop an accommodation strategy to support the growth of overnight visitation.
- 19. Develop the profile, experiences and infrastructure of Ennis as a core hub attraction and gateway to the county.
- 20. Work with community partners to strengthen the role of towns and villages elsewhere as destination hubs, through identifying infrastructural issues that constrain tourism and encouraging an ongoing improvement of infrastructure and enhancement of the public realm.

**KNOWLEDGE AND CAPACITY**

- 21. Work with Fáilte Ireland and related partners to deliver a bespoke business support programme that will enhance the capacity of industry to develop, deliver and market saleable experiences.
- 22. Support the development of the positioning themes through curating stories and working with relevant partners to advance local knowledge.
- 23. Explore opportunities to network with new partners, including non traditional partners and academic institutions, to engage in knowledge sharing and the identification of innovative thinking.

**Create awareness**

We aspire to invite our visitors to discover Clare through presenting a unified message that profiles the entire county and brings our narrative to life; and, to build a sense of cohesion and common understanding within the tourism community through internal communications.

**Strategic Priorities**

**MARKETING COMMUNICATIONS - EXTERNAL**

- 24. Refresh the destination brand and adopt a thematic approach to marketing and communications that promotes the key themes, highlights sustainability as a core value of Clare as a destination, and is aligned with the regional propositions – Ireland’s Wild Atlantic Way and Ireland’s Hidden Heartlands.
- 25. Promote our message smartly through maximising digital platforms – showcasing our iconic experiences while revealing unique bookable themed experiences that may not be expected.
- 26. Support the strategic delivery of visitor information across Clare.

**INTERNAL COMMUNICATIONS WITH INDUSTRY**

- 27. Develop regular communications programme with industry stakeholders that highlights key research, industry trends and marketing opportunities.
- 28. Develop a framework for performance measurement and communications of progress.
- 29. Continue to foster an understanding of risk and crisis management within industry, and develop a strategic approach to crisis management planning that will minimise effects and manage consequences of crises regardless of scale.

# 1. Introduction

**This ten-year strategy establishes a vision for the development of tourism in County Clare. It has been prepared for Clare County Council as a road-map for both the Council and the industry as they seek to work cohesively to strengthen the destination and enhance the appeal of the visitor experience. The concept of sustainability is integral to the Strategy.**

Tourism is regarded as one of Ireland’s most important economic sectors and key to dispersing wealth into the rural economy and smaller towns. The country has established a strong direction and a clear focus on marketing regional propositions designed to spread economic and social benefits. Within County Clare the rate of growth in tourism has followed national trends and the industry generated €244 million in 2018. The sector is positioned as core to Clare County Council’s vision – one that envisages *a county that has maximised its unique characteristics, strengths, location and connectivity to become Ireland’s centre of culture, tourism, heritage and the preferred international destination for sustainable investment and innovation...*<sup>1</sup>.

This Strategy is based on work that has established a deep understanding of what makes Clare distinctive as a destination and is designed to:

- Highlight actionable recommendations to guide and stimulate investment and development in tourism that will facilitate increased length of stay and visitor spend, and a dispersal of benefits to the wider community.
- Determine strategies that will maximise the potential of tourism to deliver net economic benefit to communities without negatively impacting the natural, social, cultural and environmental assets which provide the cornerstone of the tourism product in Clare.

Its development provides an opportunity to assess national and regional initiatives and to explore new approaches to leveraging Clare’s geographical position on both the Wild Atlantic Way and Ireland’s Hidden Heartlands.

The planning process was conducted in 2019 and involved:

- Desk-based research to review the national, regional and county-level planning context, market performance data, current and potential markets, and current positioning.
- A destination audit and assessment of sites, including the mapping of major tourism assets.
- An identification of relevant good practices and potential case-studies.
- Two phases of community consultation and workshops with 140 attendees in phase 1 and 86 in phase 2.
- An industry survey with 175 respondents.
- Presentations to Council and industry.
- Ongoing discussions with the project Steering Group.
- Environmental assessment of the strategy recommendations<sup>2</sup>.
- Extensive review of the draft Strategy prior to final revisions.

As such, this Strategy reflects the input from across the spectrum of tourism and community interests and can clearly be considered a road-map for all stakeholders.

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<sup>1</sup> Clare County Development Plan 2017 - 2023

<sup>2</sup> Separate reports have been prepared: the *Strategic Environmental Assessment Environmental Report* and the *Natura Impact Report*

## REFLECTING ON DEFINITIONS

**This document refers to a number of key concepts that underlie the strategic directions and the ethos of this Strategy. To ensure common understanding, the following definitions and statements are being used to convey the main principles. Other definitions exist, expressing similar thinking, and can equally add value to the overall philosophical context.**

### SUSTAINABLE TOURISM

*Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment, and host communities. UNWTO*

The United Nations World Tourism Organisation expands to explain that sustainable tourism is not a type of product, but is an ethos that underlies all tourism activities.

*As such, it is integral to all aspects of tourism development and management rather than being an add-on component. The objective of sustainable tourism is to retain the economic and social advantages of tourism development while reducing or mitigating any undesirable impacts on the natural, historic, cultural or social environment. This is achieved by balancing the needs of tourists with those of the destination.*

### RESPONSIBLE TOURISM

This concept is similar in what it seeks to convey, although it has stronger sense of immediacy and relates to what needs to be happen today through the actions of visitors, residents, businesses and governments to achieve the longer-term goal of sustainable tourism. It was clearly defined in the Cape Town Declaration on Responsible Tourism in 2002 as tourism that:

- *Minimises negative economic, environmental, and social impacts;*
- *Generates greater economic benefits for local people and enhances the well-being of host communities, improves working conditions and access to the industry;*
- *Involves local people in decisions that affect their lives and life chances;*
- *Makes positive contributions to the conservation of natural and cultural heritage, to the maintenance of the world's diversity;*
- *Provides more enjoyable experiences for tourists through more meaningful connections with local people, and a greater understanding of local cultural, social and environmental issues;*
- *Provides access for physically challenged people;*
- *Is culturally sensitive, engenders respect between tourists and hosts, and builds local pride and confidence.*

### SMART TOURISM

Working together in an effective manner to ensure sustainability continues to evolve with new thinking and new technologies, and a recognition of the need to work within a broader context of innovation.

The concept of smart has recently emerged and refers to the potential to use new business practices, knowledge-based innovations, and strong governance to enhance sustainable destination management and the delivery of the visitor experience.

A smart destination is defined as: *an innovative space, accessible for all, established on a cutting edge technology infrastructure which guarantees sustainable development of the land, facilitates the interaction and integration of the visitor with the surroundings and increases the quality of their experience in the destination, as well as the quality of life of residents. SEGITTUR, 2018*

## 2. The Current Situation

**A comprehensive assessment of the current situation (prior to Covid-19) has informed this Strategy, providing the context for its strategic direction and the rationale for its implementation. This assessment is based on responding to the question: “Where are we now?”**

The background research and the stakeholder consultation focused on assessing the destination and its industry from a range of perspectives to provide a holistic overview of tourism in County Clare. In particular, attention focused on:

- Understanding the wider significance of tourism, the policy context and the potential linkages between tourism and other policy frameworks – nationally, regionally and at county level;
- Considering the macro trends and factors that are influencing tourism within the county;
- Identifying current visitor markets and reviewing the performance of the industry;
- Mapping the product, including trails, attractions, accommodation and operators;
- Assessing the competitiveness of County Clare in terms of its overall strengths and opportunities for sustainable growth, and the underlying vulnerabilities that need to be addressed in the coming ten-years.

This chapter looks at each element in turn.

### THE SIGNIFICANCE OF TOURISM

Tourism has become one of the world’s largest and fastest growing economic drivers and a major force for economic growth, employment and entrepreneurship in regions and countries across the world. Today it is the third largest global export category, outpacing general growth trends in the world economy, as leisure travel in particular continues to grow.

Likewise, in Ireland the rate of growth has been noteworthy and is ahead of the average global rate.

In Clare the county welcomed 8% of all overseas tourists who came to Ireland in 2018 and hosted 5% of all domestic trips.

The Cliffs of Moher ranks as the country’s second top fee charging visitor attraction in 2018, with almost 1.6 million visitors.

The following page summarises the economic significance of tourism globally, nationally and within Clare.

## GLOBAL 2018



- **1.4 billion international tourist arrivals in 2018.**

Growth of 5% over 2017 – to achieve this target two years ahead of forecast<sup>3</sup>.

- **Export earnings grew by 4% in 2018**

This growth has been driven by a relatively strong economic environment with world gross domestic product at 3.6%, enhanced visa facilitation in many countries, affordable travel costs, and the increase in peer to peer recommendations through digital technologies.



- **1 in 10 jobs are in tourism.**



- **The share of leisure travel** has grown from 50% in 2000 to 56% in 2018, with business and professional travel now accounting for 13%<sup>4</sup>.

## IRELAND 2018

- **Out-of-state tourists to Ireland (overseas and Northern Ireland) grew by 6.5% to reach 9.6 million<sup>5</sup>** – well ahead of the global growth rate and on par with Europe in general<sup>6</sup>.
- **Visitors from N. Ireland reached 1.3 million**, growing by 1.7%.
- **10.9 million domestic trips** – an increase of 13.4%.
- **Out-of state tourist expenditure was estimated to be worth €5.6 billion** – representing a growth of 6% over 2017, with a further €1.7 billion spent by overseas visitors on fares to Irish carriers, bringing total foreign exchange earnings to €7.4 billion.
- **Domestic tourism** contributed €2 billion to the tourism economy, bringing **total tourism earnings to €9.4 billion**. This represents **3.7% of Gross National Product**.
- **1 in 9 jobs are in tourism.** 8% growth in jobs in 2018 to reach 260,000.
- Every €1million of tourist expenditure helps to support 27 tourism jobs.

## CLARE 2018

- **769,000 overseas visitors** – 8% of all overseas tourists to Ireland.
- **Irish residents took 510,000 trips to Clare** – 5% of all domestic trips.
- **Overseas visitors spent €156.5 million** representing 3% of overseas tourism expenditure in Ireland.
- **Domestic tourism** generated €88 million.
- **In total, tourism in Clare contributed €244.5 million** to the economy.
- It is estimated that tourism supports **6,600 tourism jobs in Clare** (2017) which equates with 4,440 FTEs.
- Tourism **employment earnings** in Clare are just over **€110 million**.
- When **multiplier impacts** are included, the total economic impact of tourism in Clare is **€395 million**.

<sup>3</sup> UNWTO, January 2019, *World Tourism Barometer*, Volume 17, Issue 1

<sup>4</sup> UNWTO, October 2019, *International Tourism Highlights 2019 Edition*

<sup>5</sup> Fáilte Ireland, September 2019, *Key Tourism Facts 2018*

<sup>6</sup> The UK, in contrast, showed a decrease of -3.5% (UNWTO, October 2019, *Ibid*)

## THE POLICY CONTEXT

The overarching national, regional and county-wide strategic planning framework provides a highly supportive context for this Tourism Strategy. Alignment with this integrated policy framework will provide opportunity to leverage existing policies and programmes, while at the same time adding value to this planning context.

Through strategic alignment, progress in implementation in other policy areas has the potential to directly advance implementation of the Tourism Strategy. An extensive review of the policy context was outlined in a Background Report. The following provides a high-level summary of planning initiatives that are of particular relevance.



The key elements of the national planning context are outlined below:

- **The National Planning Framework – Ireland 2040** established in 2018 has created a more holistic approach to planning than previously existed – one with a regional-centric perspective and a greater focus on stakeholder empowerment in achieving national objectives. The Framework has been informed by the United Nations Sustainable Development Goals and is based on ten National Strategic Outcomes – eight of which are particularly relevant to the development of a sustainable tourism industry and destination. These policies are mirrored in the **Regional Spatial and Economic Strategy for the Southern Region** and relate to:
  - Enhanced regional accessibility
  - Strengthened rural economies and communities
  - Sustainable mobility
  - A strong economy supported by enterprise, innovation and skills
  - High quality international connectivity
  - Enhanced culture, amenity and heritage
  - Transition to a low carbon and climate resilient society
  - Sustainable management of water, waste and other environmental resources

- **Realising Our Rural Potential** – the national action plan for rural development (2017) outlines wide-ranging initiatives designed to enrich the fabric of rural life in Ireland and rejuvenate rural settlements. Whether it is the focus on rolling out highspeed broadband or the development of rural tourism assets such as Greenways and Blueways, the Plan provides a strong and advantageous context for the development of tourism in Clare, given the degree of rurality within the county.
- **National tourism policies** have provided a basis and a series of targets to strengthen inbound tourism, while acknowledging the domestic sector as the backbone of the industry. The first policy statement following the global economic downturn, **People, Place and Policy – Growing Tourism to 2025** (2015) brought tourism to the forefront of the country’s economic strategy and enhanced the role of Local Authorities. As targets were met and surpassed, and as the National Planning Framework strengthened the planning context, the government laid out specific **Tourism Action Plans** designed to maintain sustainable growth in overseas tourism revenue and tourism employment through regional growth and season extension. An emphasis on the promotion of outdoor activities and the strengthening of less-well known attractions and regions internationally reinforces a strategic approach that will be of benefit to Clare. New national tourism performance targets set in August 2019 now aim towards generating €6.5 billion by 2025 – an increase of 25% on 2018. It is envisaged that this revenue will be generated from a targeted 11.6 million overseas visitors annually by 2025, up from 9.5 million in 2018 – (an increase of just over 22%).

A number of new tourism strategies have been developed to further support the national objectives – all of which are relevant to Clare: the ***Outdoor Recreation Plan for Public Lands and Waters in Ireland 2017 – 2021*** (March 2017), the ***Strategy for the Future Development of National and Regional Greenways*** (DTTAS, July 2018) and Fáilte Ireland’s ***Food and Drink Strategy 2018 – 2023***.

- It should be noted, however, that whether these current targets sufficiently stretch the industry is likely to be questioned by the **Irish Tourism Industry Confederation (ITIC)**. Their report in 2018, ***An Industry Strategy for Growth to 2025***, set aspirations for a 65% growth target for overseas visitor revenue with the aim of reaching the value of €8.1 billion by 2025 and creating a 35% growth in jobs, with an additional 80,000 jobs to be added to the 230,000 jobs of 2017. To achieve this growth, it is estimated that international visitor numbers would have to grow by 54% from 8.9 million in 2017 to 13.7 million in 2025. Growth of this nature will have to be facilitated through improvement to a range of enabling factors that include the development of new compelling experiences, an increase in hotel rooms and bed stock, improved air access capacity, a supportive regulatory environment and tax regime, and an increase in overseas marketing. In addition, a doubling of the government’s annual investment programme for €30 million as outlined in the ***National Development Plan 2018-2027***, to €60 million is regarded by the ITIC as necessary.

At the local level, the potential to respond to this challenge has been enhanced in recent years. Policies designed to extend the role of local government in tourism have been put in place. Since 2015, local authorities have been positioned as the major conduit and activation partner between agencies and local communities – collaborating with Fáilte Ireland and government agencies in the development of tourism and in harnessing and leveraging funding. Local governments are now playing an important and influential role in supporting day-to-day operations of tourist attractions and seeking ways to secure investment in new developments.

Within Clare, the County Council has substantially strengthened the context for developing tourism in a sustainable manner. The Council was the first county to prepare a rural development strategy following the launch of the national action plan, and the first county to establish a Rural Development Directorate. Restructuring tourism and positioning responsibility for it within this Directorate is a strong statement regarding its role as a driver for rural diversification and economic development.

Key county policies that influence tourism include:

- ***Clare County Development Plan 2017 – 2023*** which established a tourism-centric vision for the county and a series of goals, including a specific goal on tourism. Throughout the Plan there are numerous objectives that are applicable to tourism and will have a bearing on the competitiveness of the destination, including those relating to economic development and enterprise, and to rural development and natural resources. The development of this Tourism Strategy provides an opportunity to leverage these objectives.

- ***Tourism Strategy for County Clare – Statement of Strategy and Work Programme 2017 – 2022***: – this statement was a requirement of the 2015 national Tourism Policy Statement. Its vision is for a cohesive and sustainable tourism sector that maximises the county’s unique characteristics and strengths, making a significant contribution to the local economy and enhancing the county as a regional/national centre for culture and tourism. The high-level strategic goals outlined in this Statement are reflected in this Strategy.
- ***County Clare Local Economic and Community Plan 2016 – 2021*** identifies tourism as a significant economic sector and highlights a series of strategic economic and community development actions that support the context for tourism development.
- ***Clare Rural Development Strategy 2026*** seeks to reverse the economic and demographic challenges facing rural Clare while optimising the use of its rich physical environment, its built and cultural heritage, and its diverse landscapes and seascapes. It outlines new approaches to mobilising rural communities that are directly relevant to supporting the tourism sector.

In addition to these overarching policy statements, a number of plans and strategies have been developed within the county that have a bearing on the strategic priorities outlined within this strategy. These include:

- *Clare County Heritage Plan 2017 – 2023*
- *Clare Culture and Creativity Strategy 2018 – 2022*
- *Clare Biodiversity Action Plan 2017 – 2023*
- *Clare Digital Strategy 2023*
- *Inis Cealtra – Visitor Management and Sustainable Tourism Development Plan (2017)*
- *Developing Nature-Based Tourism Opportunities on the Shannon Estuary Way (2019)*
- *Bunratty Castle and Folk Park Masterplan (2019)*
- *Destination Lough Derg Strategy 2019 – 2022*
- *The Burren & Cliffs of Moher Visitor Experience Development Plan (2019)*
- *Burren & Cliffs of Moher UNESCO Global Geopark Strategic Management Framework 2019 – 2023*
- *South Clare Economic Strategic Development Zone initiative (2018)*
- *Ennis 2040 – to be completed 2020*
- *The forthcoming ‘Ennis Niche Destination Town’*
- *Shannon and Environs Local Area Plan 2012 – 2018*
- *Shannon Town Centre Spatial Masterplan (2020)*
- *The forthcoming ‘Feasibility Study for Shannon & Erne Pilgrim Way’*

These plans and strategies are further complemented by a wide range of community led discussions, plans and reports. Understanding these local aspirations has been an important element of the planning process and this strategy seeks to support these projects where there is clear alignment with wider regional priorities.

## REGIONAL PROPOSITIONS

The location of County Clare in relation to the Wild Atlantic Way regional brand is playing a significant role in raising the profile of the Clare coastline and in generating a growth in touring visitors along coastal routes. Fáilte Ireland is developing and implementing a series of visitor experience development plans that aim to extend the length of stay and increase the visitor expenditure within the area, and has currently completed the *Burren and Cliffs of Moher Visitor Experience Development Plan*.

In East Clare, the recently launched experience proposition, Ireland’s Hidden Heartlands, has the potential to be a significant catalyst for new growth and development of rural recreation and water-based tourism in that area of the county. Work is progressing on unlocking the potential of this extended region through two transformational projects – both designed to capitalise on the growth in ‘slow tourism’ – the Beara Breifne Way, and the development of the River Shannon and the lakes as a long-distance corridor for water-based activity.

This Strategy will focus on priorities that are designed to leverage these regional propositions, and the international and domestic marketing activities that supports these experiential brands.



### Wild Atlantic Way

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



### Ireland’s Hidden Heartlands

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

## TRENDS AND FACTORS INFLUENCING TOURISM IN COUNTY CLARE

The tourism industry is influenced by a wide range of macro or mega-trends and factors which are shaping demand and will have an impact on strategic priorities. Consumers are changing in how they plan and experience travel, while the industry is constantly seeking to respond to the implications of technological innovation, and geo-political-environmental considerations.

*The extent to which mainstream trends is likely to change in the Covid-19 recovery phase is noted in the blue text.*

- **Experiential travel** – this umbrella trend can now be seen across all generations and all types of travel, and has firmly moved into the mainstream market. All elements of tourism need to consider how to shift from offering products and things to do, to creating and delivering experiences that will allow visitors to immerse themselves in the destination and make a deeper connection with place and people. **Slow travel** has become a core characteristic of experiential travel as visitors take time to travel at a slower pace, often on trails or waterways, while seeking opportunities to savour local produce, meet local residents, and listen to local stories.

Post Covid-19 the desire for slow travel will be further driven by its potential to enable social distancing. Trails and waterways provide opportunity for family and friends to enjoy a greater sense of personal protection.

- Cycle tourism and long-distance hiking are two areas of slow travel that are both seeing significant growth globally. The advent of electric bikes has increased the interest in cycling and has broadened the market. In Europe, sales of e-bikes grew 12% annually between 2012 and 2016<sup>7</sup>, and estimates for the coming five years vary between a tripling to a quadrupling of the market<sup>8</sup>. In this context cycling has become both a significant motivator of travel and an important add-on activity within a destination.
- **Desire for personal enrichment and inner achievement** – as the demand for experiences grows, the emphasis is increasingly on personal transformation. Travellers are frequently looking to enrich their inner lives, gain a new perspective, or

expose themselves to a life ‘shake-up’ experience, even if it means pushing the boundaries of their traditional comfort zones. Businesses and destinations with a purpose-driven ethic are well positioned to attract these intrepid travellers<sup>9</sup>.

- **Shifting demographics** – two trends are concurrently shaping demand. On the one hand there is a growth in older markets as the baby boomer generation ages. This is a market that spear-headed the growth in experiential travel and that continues to influence trends as they increasingly look for quality and greater ease of travel. At the same time, younger cohorts particularly Millennials and Gen Z, show a strong propensity for international travel, and are highly influenced by social media and innovative approaches to connecting with local culture and engaging in unique adventure experiences.

Different age cohorts have different levels of vulnerability to Covid-19. Older travellers are likely to show a much higher degree of hesitation to travel in the initial recovery phase.

- **Co-creation** – with new technologies and social media, tourists are seeking to take more control over the creation and curation of their experiences. Through enhanced digital tools and the movement of tours and activities into the online space, visitors within a destination have become more empowered and more expectant in relation to shaping their experiences. This will only increase as the online fragmentation of the activity sector diminishes, and as the large brands such as Google, Trip Advisor and AirBnB look to facilitate this co-creation and spontaneity of decision making.

<sup>7</sup> CBI Ministry of Foreign Affairs, Cycling Tourism from Europe - <https://www.cbi.eu/node/2260/pdf/>

<sup>8</sup> Bike Europe, October 2019, Volume European E-Bike Market Forecasted to Triple within Next Five Years

<sup>9</sup> This trend is well documented in Skift, 2018, *The Rise of Transformative Travel*

- **Travel ‘to show’** – as travel for self-fulfillment grows, so too has the concept of travel ‘to show’ and the focus on ‘Instagramable’ moments. This is resulting in unprecedented growth in visitation to iconic natural landscapes and built environments, and is creating site specific management issues that are highly challenging.

The overnight collapse of coach and air travel will curtail growth of this trend for the foreseeable future. However, social media will continue to play an important role in recovery as domestic visitors promote memorable local experiences.

- **Disruptive technologies** – in line with co-creation and a desire for authentic experiences, new technologies are offering new solutions. The sharing economy has acted as a catalyst for new platforms and alternative ways of experiencing travel, as is evident with the explosive growth in AirBnB and the emergence of new transport sharing options.
- **Frictionless mobility**<sup>10</sup> – with the combination of the sharing economy and disruptive technologies, consumers have a growing expectation for navigation apps to plan their local journey in real time – whether it is by bus, train, taxi or bicycle. As this emerges in large cities with the use of apps and smart travel cards such as the Citymapper Pass in London, it is creating demand for integrated multimodal mobility systems.

A significant factor underlying the disruption arising from the sharing economy has been its transformation into a global economic force increasingly removed from its original ethos of building community, improving the environment and strengthening community cooperation.

Ironically, in many ways, Covid-19 has disrupted the disrupter. Ridesharing and micro-mobility services have virtually collapsed, and a Statista Research Department poll in the United States from early April 2020 found that 27% of respondents will be less likely to use sharing services after distancing guidelines are lifted.

The strict adoption of new hygiene protocols within shared services and facilities will allow a slow recovery, and self-contained AirBnB units, like the self-catering sector in general, will offer the opportunity for visitors to isolate their own group, and could well stimulate a growth in domestic travel. At the local level, this may be a turning point of the sharing economy as it seeks to rediscover its original values and revert to becoming a more locally-based sharing network again.

- **Big data** – as the use of technology increases, so too does the ability of the tourism industry to use ‘big data’ in driving decision making. With the combination of GPS data and digital traces of user activity, there are vast amounts of data now present that are relevant to every stage of travel. The industry is increasingly turning to big data to find new ways of improving opportunities, managing the visitor, and interacting with the traveller throughout the entire ‘travel journey’.

- **Niche sectors are evolving** as travellers look for ways to explore their passions. Areas of particular relevance to County Clare include:
  - **Geotourism** – a rapidly evolving concept that has arisen from an initial interest in landscape to include the culture, aesthetics and heritage of place. The growth in UNESCO Global Geoparks highlights this trend, and the sector has become recognised as a tool for sustainable rural development through tourism.
 

This interest in landscape and the heritage of place is likely to be an important motivator in the early stages of recovery travel. Visitors will be looking for experiences off the beaten track and in less populated areas where they can reconnect with nature again in a safe environment.
  - **Intangible cultural heritage** is similarly becoming an important element of the destination experience. As visitors seek to explore the wealth of knowledge and skills that has been passed down through generations, there is a growing interest in local traditions and living heritage – in music, sport, crafts, and social practices; and in the stories associated with the legacies of the past.
  - **Culinary tourism** – has seen remarkable growth and offers further insight into what makes a place distinctive. The mix of terroir, local culture, tradition, and ethnicity all shape the culinary experience and provide the basis for differentiating a destination.

<sup>10</sup> Skift, January 2020, *Top 10 Global Consumer Trends 2020*

- **Wellness** – is now being regarded as the new lure<sup>11</sup>. This concept has a lifestyle appeal. It can be looked at from multiple perspectives as travellers focus on how travel enhances their well-being. Building wellness into messaging is playing a role in dispersing visitors to less visited areas and in creating heightened interest in trails, appreciation in landscape, and outdoor activities that renew the mind.

The demand for wellness is set to rise considerably. From an operational perspective, visitors’ concern for their own health and well-being will be top of mind in all situations – and every physical touch point with visitors will have to be responsive to new health and safety protocols and directives, or adapt through the use of new technologies.

However, beyond these measures which will become the new norm, a deeper shift toward wellness is anticipated. Everyone has faced varying degrees of isolation, and many have had time to reflect on pre-Covid-19 lifestyles and values. The likelihood of a pent-up desire to breathe deeply in the outdoors and to re-engage in the fullness of life again, and to pursue health and well-being can be expected to stimulate new interest in this niche sector.

- **Adventure travel and microadventures** – as the market in adventure travel continues to expand, it has shown a shift away from activity associated with risk towards learning, fulfilment and being in a natural environment<sup>12</sup>.

With adventure becoming less about extreme endurance, it has moved increasingly towards smaller-scale achievable adventures closer to home. These bookable microadventures are often short overnight experiences that combine adventure, nature and culture, and are becoming important motivators in the short-break market. National Geographic has highlighted this trend as one of four in the adventure sector to watch for in 2020.

- **Destination management and sustainability** – in 2019 the UNWTO identified sustainability as a key part of tourism policies in all 101 Member States surveyed, with over half the States referring to it extensively. In 2018 the word ‘overtourism’ became one of the Oxford Dictionary’s ‘Words of the Year’ resulting in the concept of responsible travel hitting mainstream media. New debates and rigorous discussions are drawing attention to the need for better destination management and new approaches to finding balance and greater distribution of tourism benefits.

*“The trendline is crystal clear: Destinations that are to remain competitive and attractive to visitors for years to come will have to start protecting their communities and cultural capital now. This shift in approach requires reimagining the way that destination marketing and management intersect – as well as incorporating the concerns of local stakeholders into the tourism boards’ strategic planning.”* (SKIFT Megatrends 2020)

<sup>11</sup> Skift, January 2019, *Megatrends defining travel in 2019*

<sup>12</sup> *North American Adventure Travelers: Seeking Personal Growth, New Destinations, and Immersive Culture, 2017.*

The immediate strategic priorities of destinations around the world are recovery and short-term adaptation. However, there is an increasing call to use this ‘reset’ moment to take stock of the need to plan for long-term strategic adaptation in the face of ever-mounting concerns regarding climate change, environmental degradation, social inequalities, and loss of cultural identity. The UNWTO’s *One Planet Vision for a Responsible Recovery of the Tourism Sector* (June 2020) clearly voices this call with its emphasis on actions that are designed to build resilience and accelerate sustainable consumption.

*“As governments and the private sector are now embarking on a path for recovery, there is no better timing for placing future generations at the centre of the action. This implies long-term and holistic thinking with regards to the challenges of our world and thus connects with the need to transition to a more sustainable tourism model based on social inclusion and the restoration and protection of the environment. Our health and wellbeing depend on it.”*

The recovery phase should be about much more than simply trying to regain the position of 2019. It will need to be forward-looking with a commitment to more fully integrate innovative and sustainable business models and practices into the process of adaptation.

*“This crisis has highlighted both the fragility of the natural environment and the need to protect it, as well as the intersections of tourism economics, society and the environment like nothing before in history. It represents an opportunity to .... build back better tourism.”*

## COUNTY CLARE – THE DESTINATION

County Clare was named by Frommer's as one of the world's Best Places to Go in 2018. *"The rugged western coast of Ireland isn't just one of the best places to go in the world; it's among the best in the galaxy. You don't have to look hard to find IMAX-worthy scenery at this wild-watery spot..."*.

*"Less than an hour's drive south of Galway is the Burren in County Clare, a crazy-paving, karst-limestone landscape that changes colour from shell pink to silvery grey, depending on the clouds that roll overhead. Foragers, cheesemakers, brewers and fish-smokers form a network that makes a big deal about small batch. Combining city and country, this is one of the most exciting places in Ireland for the food-obsessed right now."* (Condé Nast Traveller, July 2019)

County Clare has an exceptionally rich and diverse natural and cultural heritage that has the potential to give it a strong comparative advantage. **The diversity of landscapes is striking and the asset base for activity and nature-based tourism is considerable.** The county is almost entirely surrounded by coastal, estuarine and fresh water systems giving the region a distinctive 'island-like' geography that has in turn influenced its cultural heritage over the centuries.

The combination and interplay of land and water are enhanced through iconic natural landmarks associated with the world-renowned Cliffs of Moher, the equally dramatic coastline of Loop Head, and the water-carved Burren plateau, regarded as one of the finest and most extensive karstic terrains in Europe. Ireland's longest river, the River Shannon, traverses along the east side of Clare, passing through the country's second largest lake, Lough Derg, before entering the Shannon Estuary – Ireland's largest estuarine waterway. The associated ecosystems and the biodiversity of the county are equally striking and are intricately linked with the value of the county's tourism assets. The visitor has a wide range of opportunities to explore the diverse waterways, coastlines, woodlands, and caves that the area has to offer, and to enjoy geological heritage that has international recognition in the Burren and Cliffs of Moher UNESCO Global Geopark.

**From a cultural perspective, this landscape and its ecosystems have shaped the story of Clare over the millennia and the visitor experience is as much about cultural heritage as it is the natural heritage.** The geography of the county has given rise to a long history of independence and has played a key role in the evolution of its cultural heritage and its rich traditions of music and the arts. Ireland's earliest evidence of human occupation can be found in Clare dating back to the Palaeolithic period around 10,500 BC, and the imprint of life down through the ages is scattered across the entire county. The Office of Public Works (OPW) has mapped over 7,500 recorded monuments, one of the highest densities in the country; and the visitors have a fascination for many of these sites from the County's famous dolmen at Poul nabrone to the wide range of monastic sites, castles and forts – and for the rich tapestry of stories that relate to these sites. The medieval townscape of Ennis, the ecclesiastical settlements of Killaloe and Quin, the Victorian resorts of Kilkee and Lisdoonvara, and the patchwork of today's farmed landscape and rural villages appeal to a wide spectrum of visitors. **The rhythm and flavour of contemporary culture** experienced in the pubs, towns and countryside, combined with Clare's global recognition for traditional music, dance, storytelling and the arts, are becoming increasingly regarded as key attractors for visitors staying in the county.



## STRENGTHS

Strengths are generally encapsulated in a brand and in the positioning of a destination. The pre-existing Clare Tourism Brand book highlights many of the existing strengths:

*“Discover the soul of Ireland by visiting Co. Clare in the heart of the west coast. You’ll find a warmth and depth that will touch your heart and invigorate your soul. With the Cliffs of Moher and the striking Burren landscape, Co. Clare has an exciting array of outdoor activities, summer festivals and events to keep any visitor happy. Come for the music, take in the scenery, enjoy the food, breathe the fresh air and feel alive!”*



The strengths of Clare as a destination are extensive:

- **Iconic and diverse landscapes** that include:
  - The world renowned **Cliffs of Moher** and flagship natural attraction with 1.6 million visitors in 2018.
  - **The Burren** – internationally unique karst landscape and international recognition through **UNESCO Global Geopark designation** for the Burren, in addition to its current listing on the World Heritage Site Tentative list of Ireland.
  - The **Burren National Park**.
  - **Loop Head** – a peninsula of panoramic cliffs, solitude, and a diverse range of experiences, including the historic Loop Head Lighthouse.
  - Nine international **Blue Flag beaches**.
  - **Lough Derg** with its 80 km waterway corridor which was designated as a Blueway in March 2018.
  - The final stretch of the **River Shannon**.
  - Estuarine waterways.
  - Coastal and inland water-way islands.
- **Biodiversity that is of international significance** offering exceptional assets for ecotourism:
  - **The flora and fauna of the Burren** (Mullaghmore, for example, is one of the richest butterfly sites in Ireland).
  - **Outstanding birdlife** – The Cliffs are a breeding site for 30,000 seabirds; the Shannon and Fergus estuaries provide wintering for over 70,000 birds in the mudflats, sandflats and salt marshes; and over 500,000 migrating birds can be seen migrating south across Loop Head from northern countries.
  - Ireland’s only resident bottle-nosed dolphins in the local waters.
- **20% of Clare is designated for conservation** with 47 Natura 2000 sites, including 37 Special Areas of Conservation, 10 Special Protection Areas, and 14 Natural Heritage Areas, in addition to the Burren National Park.
- 14% woodland cover, including ancient native woodlands and wet woodlands.
- 34 wetland types with wetlands accounting for at least 7% of Clare.
- **Strong resource base for outdoor adventure** and a spectrum of land and water-based activities that includes **four National Waymarked Trails** and cycle routes.
- **Global recognition for golf** and renowned success in hosting international tournaments.
- **Rich cultural heritage assets** that tie the county back to the beginning of human history in Ireland (including assets on the UNESCO World Heritage Site Tentative serial lists):
  - Earliest evidence of human occupation in Ireland; numerous tombs from the Neolithic age including the famous dolmen at **Poul nabrone**.
  - 7,500 known **archaeological sites**.
  - **Strong imprint of Christianity on the landscape** with an array of early monastic sites from St Senan’s founding church on **Scattery Island** to St Caimin in **Inis Cealtra** on Lough Derg, and St Tola at Dysert O’Dea. The monastic heritage includes impressive legacies of later European monastic orders across the county.
  - Significant history and presence on the ground of the Gaelic Clare clans, with the most prominent personality being **Brian Ború** who became the last High King of Ireland from his base in Killaloe before the Norman invasion.

- Clare has a large number of castles and towers across the landscape. The flagship castle and related cultural heritage experience is **Bunratty Castle & Folk Park** – a 26-acre themed showcase of the region’s folk heritage visited by 405,000 in 2019 – under the management of Shannon Heritage.
- County Clare – ‘**The Banner County**’ and its rich association with long standing traditions relating to the carrying of banners – from times of battle to times of trade.
- **Towns and villages that are steeped in their historic origins.** They offer visitors an opportunity to explore the stories of Clare, experience contemporary culture, enjoy the county’s long tradition of hospitality, and engage in the 150+ festivals and events that are hosted annually in the communities.
  - **Ennis – the county town**<sup>13</sup> – a medieval settlement (designated as an Architectural Conservation Area) that has retained much of its early personality including its lanes and bow-ways, and is well positioned to act as a gateway to the entire county.
  - **A range of coastal towns and villages** – from fishing villages to Victorian sea-side resorts; from eighteenth century planned settlements to sites of ancient castles; and from villages associated with extensive sandy beaches to towns that are capitalising on contemporary sea-based adventure.
  - **Inland towns and villages** with equally eclectic characteristics and rich cultural heritage associations from prehistoric tombs to monasteries; from traditional and contemporary music, song and poetry to matchmaking and Father Ted; and from Victorian spa and wellness to modern day water-based activity areas.
- **An interesting industrial heritage** relating to Ardnacrusha and Moneypoint Power Generating Station, and the older rural industrial heritage in East Clare (lime kilns, iron works, and cottage industries).
- **A vibrant contemporary culture** that has strong ties to the past and plays a key role in animating the County’s heritage and traditions.
  - Clare is unofficially recognised as the global home of **traditional music** with an annual calendar of music festivals and traditional music sessions offered in many of the pubs throughout the year. The county played host to Fleadh Cheoil na hEireann in 2016 and 2017.
  - The landscape has inspired numerous **writers and artists** through time and the county hosts a range of writers, book club, artists, and drama festivals.
  - **Local food** is gaining prominence and is a reflection of place and local culture.
  - The **Gaelic Athletic Association** traces its roots to Clare. **Hurling and uilleann piping** – Ireland’s two UNESCO designated examples of intangible cultural heritage have a marked presence in Clare.
- Clare’s location in relation to the **Wild Atlantic Way** and **Ireland’s Hidden Heartlands**.
- **Clare’s location between two large catchment areas** – Limerick City and Galway City.
- **Excellent transport connections** to County Clare:
  - **Shannon Airport** – which served 1.72 million passengers in 2019, with US Immigration Clearance and multiple direct flights to Europe and the United States of America;
  - The motorway connections via the M4/M6 and the M18;
  - The rail service to Ennis;
  - The Shannon Estuary – Ireland’s premier deep-water port.
- **Strong local tourism networks and community groups** that champion the sustainable development and promotion of tourism.
- **A broad cross-section of businesses and operators with 42% optimistic of growth** and only 14% concerned with the possibility of decline in the short-term<sup>14</sup>.
- **A proactive Council** that has clearly highlighted the importance of tourism as a cornerstone of the County’s economy and identity, and is proactively working to strengthen the sector.
- **Current and planned investment in tourism product** – including The Cliffs, Bunratty Castle & Folk Park, and the €6.8 million secured by the Council under the Rural Regeneration and Development Fund for a range of projects including Doolin, Inis Cealtra Island, Vandeleur Estate, Loop Head, and Lahinch.

<sup>13</sup> Ennis is identified as a Key Town in the *Regional Spatial and Economic Strategy* framework for development.

<sup>14</sup> Industry survey completed in 2019 as part of the strategic planning process.

## STRATEGIC CHALLENGES

Identifying a strategic direction that will enhance competitiveness in a sustainable manner requires a critical look at what is constraining growth or what is undermining sustainability. The county is well endowed with assets that have the capacity to provide a solid base for differentiating the destination, attracting aligned markets and providing the basis for rural diversification and economic growth. However, understanding systemic challenges and vulnerabilities and determining ways of addressing these issues are steps that are equally important to leveraging strengths, and are generally part of the same process.

*In the middle of a difficulty lies opportunity.*  
Albert Einstein

*Our strength grows out of our weakness*  
Ralph Waldo Emerson

**Post Scriptum:** This section reflects the 2019 assessment of the industry and the destination. Clearly, with launching this Strategy in the months immediately following the re-opening of the country to domestic travel, **the most significant strategic challenge facing the industry in the initial years of implementation is recovery from Covid-19.**

- **Tourism performance** – while the county commands a strong position in terms of attracting international visitors (5th ranking in 2017), the market share of expenditure is considerably less. In 2018 Clare welcomed 8% of all overseas tourists who came to Ireland, but only benefitted from 3% of the overseas tourism revenues. The return on domestic trips, on the other hand, is much healthier with the county attracting 5% of all such trips in 2018 and 5% of the domestic spend.

**A key factor in the lower return on the overseas visitor has been the significant increase in day-trip coach tourism from out-of-county** – primarily Dublin, Limerick and Galway. Much of this day-trip market is attracted to the Cliffs of Moher where growth in visitation has far out-paced overall tourism related trends in Ireland. While total visitation in Ireland grew by 36% between 2012 and 2017, the rate of increase experienced by the Cliffs of Moher stood at 75% for the same period of time, and 60% of all visitors to The Cliffs now arrive on day-trip buses (pre Covid-19). There are a range of factors contributing to the accelerated pace of growth, including motorway developments and the reduction in travel time; the growth of Dublin International Airport as the main port of entry (at the expense of Shannon Airport); and the increasing market awareness of The Cliffs as a must-see ‘bucket-list’ destination. Efforts are being made to address the growing concern through new coach licensing arrangements and a more dynamic trade pricing model that is designed to increase the spend within the county and spread the demand into the shoulder periods of each day.

**However, a series of challenges and concerns arise from this shift in market dynamics** – namely:

- **Traffic issues** within the hinterland of The Cliffs. In the survey of industry stakeholders, 20% highlighted traffic management and congestion issues and 17% referred to concerns arising from the current demand – including its low value. The growth in coaches is of particular concern within the Burren given the impact of traffic on the aesthetics of this unique landscape and the visitor experience. In addition, travel for local residents can be impacted at times.
- **A loss of overnight revenue** particularly to Dublin, as overnight visitation increasingly originates in Dublin and other key hubs outside of the county.
- **Uneven dispersal of benefits** – while there are areas and businesses that are experiencing considerable growth, the value of tourism in other parts of the county is limited. Addressing this as a key objective in a county-wide strategy will be essential.
- **Concern regarding the underlying sustainability of the industry and the destination.** The shift in market dynamics has highlighted the need to look at sustainability as an integral element of competitiveness.

The performance of the industry is compounded by further weaknesses that relate to the destination experience, the supporting infrastructure, the approach to destination development, and the dynamics of industry itself. These include:

- **The loss of air routes into Shannon Airport** – despite its proximity and a 32% growth in passengers since the Airport became independent, the role of the Airport as an overseas gateway to the west has been steadily eroded through the increasing dominance of Dublin International Airport. Today Dublin accounts for 86% of all air traffic – an increase from 73% in 2005. As a result, there has been significant loss of ‘entry’ share from four key leisure markets for the west of Ireland – the USA, mainland Britain, Germany and France, which in turn has led to a decline in bed-nights within Clare.

A new analysis of aviation policy as a driver of regional economic development in the west<sup>15</sup>, has clearly highlighted the importance of strengthening air access into Shannon Airport, and the need to build strategic connectivity that would enhance Shannon’s role as a hub and entry point. However, while the negative impact on regional economic growth and tourism can be clearly illustrated, concerns are mounting regionally over Dublin Airport’s plans to expand services and infrastructure to grow from 30 million passengers to 40 million on an annual basis.

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<sup>15</sup> Copenhagen Economics, October 2019, *Assessment of Aviation Policy as a Driver of Economic Development in the West and Mid West of Ireland* (commissioned by Limerick Chamber, in association with the Galway Chamber, Ennis Chamber & Shannon Chamber).

- **Internal public transportation systems are limited**, and coordination between existing services can be difficult. While Ennis provides connection to local and regional public bus services, once outside of Ennis it can be challenging or in places impossible to move around the county without the use of a personal car. The lack of public transportation options in the evening has been identified as having a negative impact on local pubs and restaurants, and limited rural transportation restricts access to local trail heads for hikers.

In June 2019, a new seasonal shuttle service was launched to provide direct services between Ennistymon, Lahinch, Liscannor, Doolin, Lisdoonvarna and the Cliffs of Moher Visitor Experience and Cliffs of Moher Coastal Walk, which has assisted in addressing transportation issues in the north-west.

- **Green infrastructure** that would facilitate alternative active modes of transport and connection is largely absent and regarded as a major deficit within the county.
- **The trails system** is an important potential asset and community groups and agencies have invested considerable effort into establishing local trails and networks. However, the approach to developing trails has evolved in a relatively ad hoc manner, and challenges relating to connectivity, maintenance, and new uses such as mountain biking need to be addressed to fully leverage existing trails as a tourism asset.

- **The county as a destination lacks a clear identity in the market place.** While it benefits from The Cliffs as an iconic landscape with other well recognised destinations, including the Global Geopark, Clare has a disjointed offering and is generally thought of as a series of disconnected destinations. This is further accentuated by the fragmentation of the industry itself when looked at from a county perspective, with a particularly strong sense of disconnect between east Clare and the western and northern areas. Identifying a strong positioning for Clare will be important in determining strategic priorities for product development and in creating a greater sense of destination unity.
- The county has considerable **untapped potential** in relation to its biodiversity, its fresh water assets and capacity for water-based activities, and its tangible and intangible cultural heritage, including its contemporary culture and traditional music and distinctive medieval heritage. There are various planned initiatives and projects that are partially underway, but the offering remains somewhat disjointed. Focusing on a positioning narrative and creating a unifying vision for Clare as a whole will provide the basis for a more cohesive approach – one that will be reflected in experience development, industry development, and marketing and communications.

- Weaknesses within the accommodation sector are further constraining the growth of over-night visitation. Specific vulnerabilities relate to:
  - **Insufficient number of rooms with a star rating of four or more** – particularly when County Clare is compared to its neighbouring counties or to the national average.
  - **Quality issues** with a number of the existing three and lower starred properties, and a sense of tired infrastructure creating a mis-match between the experience and visitors’ expectations.
  - **Areas with insufficient hotel rooms** and lack of adequate stock for the short stay market, which is further compounded by vacant and/or closed hotels where rooms are required.
  - **Lack of adequate camping and caravan/RV sites** and a need for quality infrastructure for this market.
  - **A need for additional higher-rated rooms in Ennis and consistent quality**, together with quality self-catering apartments to meet the needs of the ‘bleisure’ market – the combined business-leisure sector.
  - **Growing issues with the widespread increase in AirBnB** – while this can fill a gap, there are concerns relating to inconsistencies in the quality of the experience, and to the reduction of local housing (in certain areas) arising from the shift in use.
- Gaps in community infrastructure and services have been highlighted in various areas. The impact can vary from constraining new investment in product development, through to negatively impacting the quality of the visitor experience and the aesthetics of place. These include:
  - Lack of adequate **water and wastewater** facilities in a number of rural towns and villages.
  - Inadequate **public toilets, street lighting, signage, parking and litter facilities** in areas.
  - **Broadband and connectivity issues** with the county lagging in 18th position in terms of access<sup>16</sup>. Currently 55% of premises across County Clare cannot access high speed broadband as a result of a lack of telecommunications infrastructure, particularly in the west of the county<sup>17</sup>. This will further curtail small and medium sized enterprises’ (SMEs’) use of new technologies in promoting and delivering experiences – an issue that is further compounded through lack of knowledge and capacity to utilise services that do exist.
  - **Access to visitor information services** at points of entry to Clare and within many rural settlements.
- **The readiness of the industry** to develop and deliver compelling experiences and to work collaboratively towards building a competitive and resilient destination faces vulnerabilities relating to:
  - **Insufficient mechanisms to facilitate county-wide collaboration** and strong leadership within the industry. There is a sense of distrust between the public and private sector that is likely to be curtailing effective growth of partnerships.
  - **A business environment** that feels hampered by the costs of doing business, and is facing issues relating to internal capacity, ability to access and retain suitably trained staff, and the diminishing availability of volunteers.
  - **Seasonality** is a pronounced vulnerability and compounds many of these weaknesses.

The impact of these strategic **challenges is accentuated by growing competition** that Clare faces from other destinations both within Ireland and overseas. As destinations elsewhere become increasingly strategic in their approach to product development, marketing and management, the importance of a clear strategy becomes more critical.

**In addition to these strategic challenges, there are global uncertainties** that are contributing to the vulnerability of the industry. The potential impact of a global pandemic health scare (now realised in Covid-19); the fear of a slowing down or recession in the global economy, with the US and German markets already showing traits of a tightening market; together with the impact of Brexit provide a degree of uncertainty that can reduce levels of confidence. Working to mitigate all of these challenges lies at the core of this Strategy.

<sup>16</sup> Ibec, October 2018, *Local Economic Indicators 2018*.

<sup>17</sup> Clare County Council, 2018, *Clare Digital Strategy 2023*

# 3. Strategy Overview

## VISION 2030

**CLARE** is a globally renowned sustainable and *vibrant* destination, recognised for its compelling array of adventure activities and its remarkable experiences portraying our rich culture-scape of age-old spirituality, power and influence; our contemporary vitality arising from our deep-rooted traditions in music, sport and innovation; our dynamic rural towns and villages where our hospitality excels – all set within our stunning backdrop of unique and varied living landscapes.

*Dílis d’ár nOidhreacht*

## OUR PROMISE

To deliver experiences that leave our guests feeling VIBRANT

## OUR GOALS

To work collaboratively:

1. To deliver compelling quality experiences that reflect and leverage our unique identity.
2. To be globally recognised as a sustainable destination.
3. To create a smart destination that reflects our strong commitment to sustainability, connectivity, innovation and new approaches to doing business.
4. To be regarded as ‘the gateway to the west’.
5. To spread the benefits of tourism across the county and throughout the seasons in a way that enriches our communities while maintaining our distinctive identity and the integrity of our landscapes.



## DEFINING OUR NARRATIVE

What is distinctive about Clare? That question reveals a multiplicity of identities, a diversity of landscapes, a depth of history, and an independence of spirit that is difficult to find anywhere else in Ireland. Equally, it highlights the complexity of positioning the county. The underlying strength of its diversity can give rise to issues in communicating what it has to offer to visitors. ‘Something of everything’ can get lost in the mix and noise of the marketplace.

Key to building a strong and dynamic destination, is the development of a narrative that simplifies what Clare has to offer – in the minds of the visitor, the trade and the industry itself.

What is distinctive about Clare? It offers the opportunity to FEEL VIBRANT in a land that pulsates with the *heartbeat of ancient stones*.

*“The way you look at things is the most powerful force in shaping your life.”*

John O'Donohue, Anam Cara



## DISCOVER CLARE – FEEL VIBRANT

in a land that pulsates with the *heartbeat of ancient stones*

**This is a county** where the diversity of landscapes sculpted by wind, water and ice offers intrigue, adventure, family fun, and a sense of well-being; and where the serenity of the islands, waterways, coast and countryside have instilled a sense of spirituality through the centuries and continue to bring tranquility to one's inner being.

**This is a county** where the peoples of the past have left their hallmarks for millennia; and where the intangible presence of life in the epicentre of Ireland's medieval political system still lingers in our castles and towers.

**This is a county** where our passion for life has long been expressed through our innovative talents and music – a passion that is inspired by the energy of our waves, the grandeur of our cliffs and the fertility of our rocks.

**This is a county** that is firmly committed to maintaining the integrity and authenticity of everything that makes Clare a special place to visit – our landscapes, our distinctive heritage, and our everyday way-of-life and traditions.

Offering the opportunity to feel vibrant in a land that pulsates with the *heartbeat of ancient stones* is rooted in the experiential. We need to make our experiences ‘pulsate’ with life. We need to bring the story of Clare to the forefront to help our visitors understand what is truly distinctive about our county, its landscapes, its people today, and its rich past. We want our visitors to emotionally connect with a place that is special to all of us, and we want them to feel enriched and to leave with a deep appreciation of Clare and an understanding of our passion to keep it special. If we are successful at doing this, their memories will help inspire return visits and like-minded visitors to follow in their foot-steps.

**Four experiential themes** encapsulate what we can do best to make Clare stand out in our markets, and to deliver on our promise.

## DISCOVER CLARE – FEEL VIBRANT

in a land that pulsates with the *heartbeat of ancient stones*



### Experience our HOLISTIC LANDSCAPES

The connectedness of our diverse landscapes is intriguing and the variety provides a truly distinctive quality to County Clare. Its aesthetic appeal is therapeutic and inspires well-being. Whether it is the grandeur of our majestic cliffs and our dramatic karst terrain or the serenity of our rolling drumlins and farmscapes, or whether it is the ecological diversity of our estuaries and beauty of our waterways or the tranquility of our woodlands and the open expanses of our beaches – our geography, geology and ecology and the inherent beauty resonates with everyone. This distinctiveness is recognised in our international UNESCO Global Geopark, in our national park, and in our range of other landscape and ecosystem designations – and provides the backdrop for a wide spectrum of geotourism experiences.



### Explore our HIGH TOWERS AND HIGH POWERS

This is a culture-scape of remarkable spirituality, power and influence. Our prehistoric tombs and ancient dolmens take us back to the beginning of human activity in Ireland. But... perhaps it is the rich legacy of the medieval era that really has the capacity to fascinate and to provide the basis for experiences that unpack the stories and intricacies of an ecclesiastical landscape that is virtually unrivaled. One where kings and monks rubbed shoulders, where heavenly and earthly powers seemed intertwined, and where Ireland's last High King adds an indelible signature to the story of Clare. Whether through banquets, pilgrimages, retreats, or guided tours, this land of medieval legend with its castles, towers and abbeys, continues to intrigue and inspire visitors and locals alike.



### Pursue our ADVENTURE AND FAMILY FUN

With such diverse geography, our county offers a paradise for adventure – from surfing epic waves to kayaking inland waterways; from cycling backroads and by-ways to hiking trails that criss-cross the county; from caving to climbing in unique karst terrain; and from premier golfing to remarkable fishing – all in settings that attract enthusiasts from across the world. The extensive and varied coastline with its array of International Blue Flag beaches; the growing network of way-marked trail systems; and the wide range of estuary and inland recreational waterscapes give Clare the resource base to become a hub for adventure, adrenalin and family fun on land and water.



### Celebrate our CREATIVE VITALITY

A sense of vitality can be found in our villages and market towns, and in our festivals and our everyday lives. It is captured in the colourful banners, it is celebrated in our traditional music, it is expressed in our poetry, song, craft and sport, and it can be savoured in our local food. This vitality embraces both our innovation and our commitment to tradition – from our stories of pioneering the electrification of the entire country to celebrating the ancient autumnal tradition of Winterage in the Burren – innovation and tradition co-exist. This vitality and our appreciation for what makes Clare so special, underpins our commitment to making sure that everything we have to offer our visitors today will be here tomorrow.

## OUR FUNDAMENTALS FOR SUCCESS

This is a road-map for the entire industry – businesses, the public sector, agencies and communities. It is based on a vision of a becoming a leading sustainable destination – one where the concept of ‘smart’ lies at the core, and the aspirations of the industry and communities drive the strategic direction.

It is designed to provide a new paradigm for doing businesses, for shaping ongoing planning discussions, for developing infrastructure and for marketing. It aims to differentiate Clare – its experience on offer and the way the industry works together to achieve progress.

It is a bold commitment. These fundamentals are reflected in our goals and in the strategic directions outlined in this strategy. They will shape our process of decision making in the coming ten-year period and will keep us focused on our aspirations for tourism and our vision for Clare.

## OUR ASPIRATIONS<sup>18</sup>

To develop tourism and manage the destination in a way that will

- “Be sustainable / green / ethical”
- “Protect our assets and preserve the quality of the environment”
- “Maintain our sense of place and charm”
- “Be balanced and create harmony”
- “Reduce seasonality”
- “Revitalise our rural areas and enhance the vibrancy of our towns, villages, and cottage industries”
- “Create greater economic benefits – spread across the county”
- “Deliver the top in themed areas such as adventure and activities, food, music, heritage, sport”
- “Aim for quality over quantity”
- “Focus on well-being and ‘slow’ tourism”
- “Facilitate appropriate development of select attractions of scale that can handle high levels of visitation in a sustainable way”
- “Provide transport connectivity within the county”
- “Enhance air access and position Clare as a gateway county”
- “Unify the county and develop joined-up propositions”
- “Ensure that we are future-proofed”
- “Facilitate collaboration – working together, cross-selling”
- “Accelerate the development or improvement of supporting infrastructure – accommodation, sewage facilities, broadband”

**Our fundamentals for success** are a series of guiding principles that not only underlie this strategy, but will shape its ongoing implementation and our approach to developing Clare as a destination. They are a commitment to:

1. **WORKING COLLABORATIVELY** – recognising that working towards a shared vision and common direction will create new levels of synergy and momentum, and will accelerate progress toward being a smart destination.
2. **ELEVATING THE PRINCIPLES OF SUSTAINABILITY** – to ensure that how we generate wealth from our visitors does not compromise the future of our destination or the well-being of our communities, and that we develop tourism in a way that promotes social and cultural return.
3. **STRENGTHENING LOCAL ASPIRATIONS** – to enable all parts of the county share in the benefits of tourism and to highlight the distinctiveness of our range of communities to our visitors.
4. **ADDING VALUE TO THE OFFER** – through building a strong narrative and delivering immersive experiences that truly allow our visitors to emotionally connect with our county and leave feeling revitalised.
5. **PURSUING INNOVATION AND CONNECTIVITY** in all aspects of destination development and tourism management to enable us to fully embrace our potential.

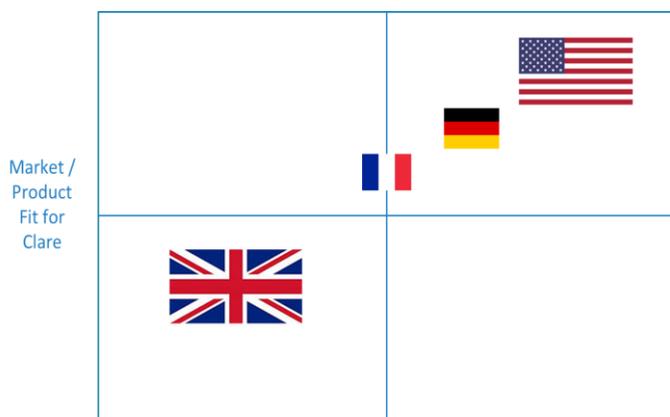
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<sup>18</sup> Quotations from 2019 planning workshop participants

## UNDERSTANDING OUR GROWTH MARKETS

Considerable research has been carried out by Fáilte Ireland on the markets offering the best prospects for the west of Ireland. The three overseas target markets – the *Culturally Curious*, the *Great Escapers* and the *Social Energisers* – together with the domestic segment, *Connected Families*, are the segments with the greatest propensity to visit Clare and to stay overnight. Understanding who these visitors are – their expectations, preferences, and what influences their trip planning behaviour – is just as important in terms of experience and destination development as it is in relation to marketing. Targeting these markets will provide strong alignment with Tourism Ireland and Fáilte Ireland marketing activities and programmes.

In the immediate Covid-19 recovery phase, the domestic market will be critical to re-starting the industry.



Value for Clare

Size of flag is proportional to the size of the potential market

**CULTURALLY CURIOUS**  14.8m  16m  4.7m  21.6m

**Key words** – curiosity, authenticity, immersion in local culture, off the beaten track, quality of experience, well-being.

**Focus** – they want to relax, enjoy and explore the natural environment and experience the real Ireland by being active in a scenic landscape. They want to go home feeling they really explored a place and feeling good about themselves socially, physically, mentally and spiritually.

**Who are they** – ‘Explorers’ rather than ‘tourists’ – well travelled and want to discover the hidden stories and get under the skin of a destination; socially responsible, environmentally conscious and health conscious; independent sightseers who rarely travel in a family group.

**GREAT ESCAPERS**  12.7m  6.5m  5.6m  14.9m

**Key words** – slow travel, relaxation rebalancing, escape, connecting with loved ones, memory-makers.

**Focus** – Connected with nature/scenic landscapes and enjoy experiencing and watching the changing landscape as it can offer the respite they need from everyday life. Look for good value, quality local accommodation from B&Bs to self-catering, and local food. Enjoy interacting with local people as a means of understanding the living culture and hearing their stories through music, food and dance.

**Who are they** – off season travellers; independent; very price and value conscious; look for personal and trusted recommendations before purchasing; often travel as couples.

**SOCIAL ENERGISERS**  5.2m  4.2m  3.4m  23m

**Key words** – excitement, energy, spontaneous, social, adventure, fun.

**Focus** – influenced by the travel stories and experiences of others they meet; seek to experience a lot and do a lot; look for easy access; seek different local foods and post food images; live for today.

**Who are they** – early adopters and trend setters; don’t want to miss out; frequent users of digital technology and social media; travellers rather than tourists; travel in groups or couples.

## CONNECTED FAMILIES 23% domestic market

**Key words** – variety, feel special, happy children.

**Focus** – grow as a family, quality time, creating memories; very focused on planning and finding everything to do; love to see the children enjoying simple things; like to stay in hotels or self catering; share photos with friends and family on social networks.

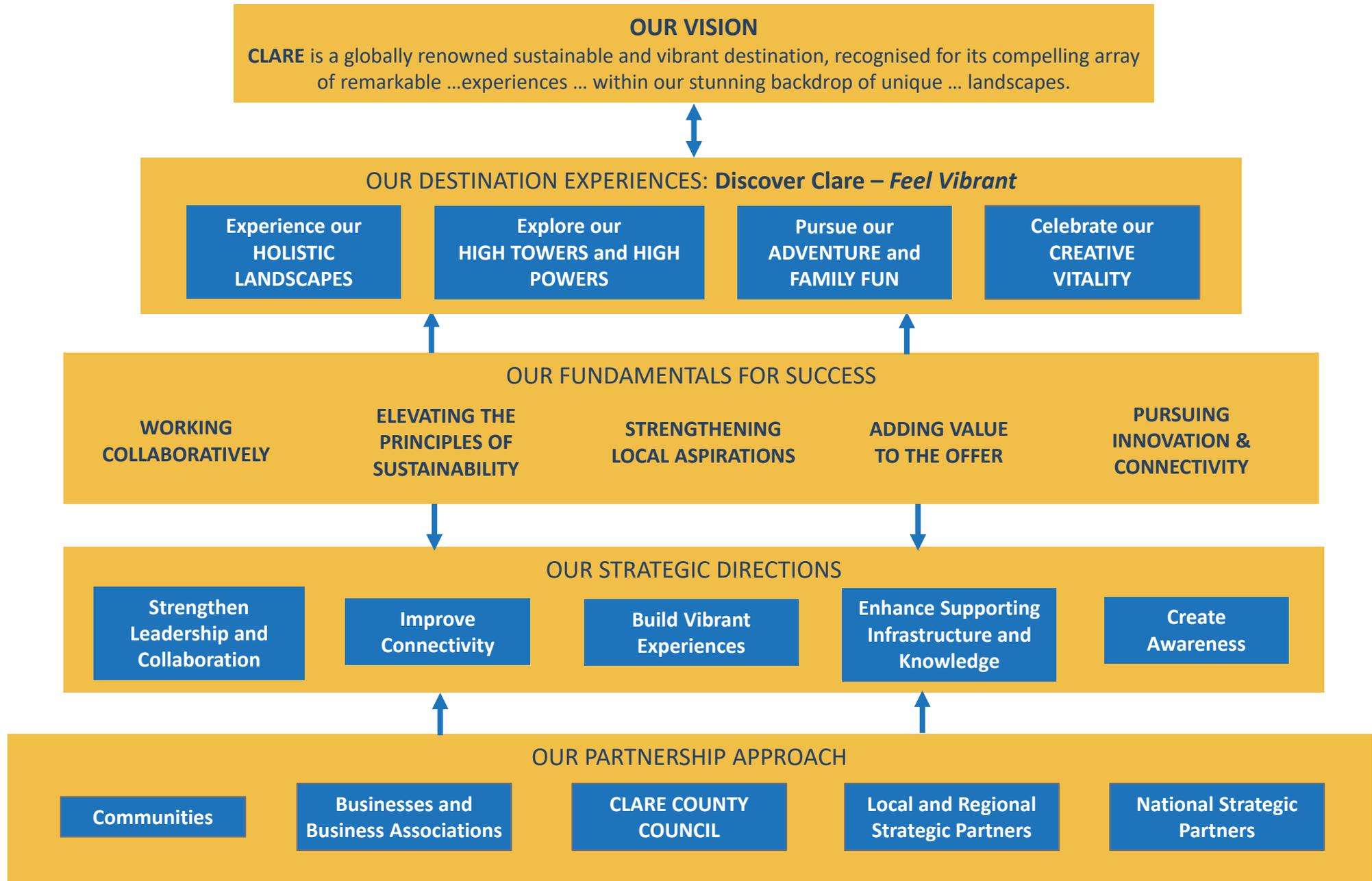
**Who are they** – families with young children (generally under 10); book well in advance; meticulous planners; most likely to travel in July and August.

## NICHE MARKETS

In addition to the three overseas segments and the key domestic segment, there are a number of significant niche markets:

- Golf – higher end
- Wellness
- Geo/ecotourism
- Adventure sports
- Diaspora – a highly important segment in the initial recovery of overseas tourism post Covid-19
- Business
- New Shannon air routes as they open up

## STRATEGY FRAMEWORK





## 4. Our Strategic Directions

## A. STRENGTHEN LEADERSHIP AND COLLABORATION

**We aspire to a joined-up approach where we work together toward a common vision. We recognise that the community of tourism interests across the county is diverse, and strategic steps need to be taken to enable a collaborative approach that will draw from our collective strengths. Through this strengthened leadership and collaboration, we will ensure that our ‘fundamentals for success’ are at the fore-front of our combined efforts to build a sustainable and competitive destination and industry.**



Addressing the current fragmentation and creating leadership that will inspire a greater level of collaboration and partnership between the public and private sectors, and between traditional tourism interests and non-traditional interests, will be imperative to facilitating growth. Providing opportunities for cross-sectoral and cross-community discussions, and establishing mechanisms that will allow for well-informed decision-making and strategic oversight of the implementation of this strategy will be essential to its success.

**Strong governance is seen as a hallmark of ‘smart’ tourism.** If tourism is to benefit the wider community and economy, it requires a co-constitutive relationship – one that acknowledges and embraces the plurality of stakeholders. Today’s approach to tourism has to be comprehensive and cross-cutting – it has to recognise the larger ecosystem that is now involved. Strong governance requires dialogue and collaboration to maximise opportunities and to ensure tourism is moving in the direction that aligns with local aspirations. It needs to be characterised by transparency, accountability, and a commitment to stakeholder involvement.

The county has a number of local networks that play an important role in developing and promoting tourism. Examples include the Ennis Chamber of Commerce/Promote Ennis, the Shannon Chamber, Loop Head Tourism, Tourism East Clare, the Burren Ecotourism Network, and community groups such as Doolin Tourism, Ennistymon Tourism and Lisdoonvarna Tourism.

In addition to these local groups, there is a diverse range of regional and national agencies and organisations that are influential in shaping the product offering and the messaging. Key players such as Fáilte Ireland, Waterways Ireland, Clare Local Development Company, Shannon Heritage, Coillte, the National Parks and Wildlife Service and the Office of Public Works are all examples of stakeholders that are involved in the delivery of tourism.

At county level, the County Council’s role in tourism was enhanced through the Government’s policy on local government (*Putting People First: An Action Programme for Effective Local Government, 2012*) and the 2015 national Tourism Policy Statement. Through the latter, local authorities have been directed to act as the major conduit and activation partner between agencies and local communities, and to collaborate with Fáilte Ireland and government agencies in the development of tourism and in harnessing and leveraging funding. This positions Clare County Council as the primary developer of public tourism infrastructure and as a key enabler. The County has taken on this role and, recognising the importance of tourism to Clare, has positioned it firmly as a driver for rural diversification and economic development. New public sector resources have been assigned to its development and internal restructuring now gives tourism a presence within the executive level of management. As opportunities to develop the county’s assets have grown through successful funding initiatives, internal efforts are being made to work more cohesively as a team.

Attempts have also been made to establish a regional structure that would encourage a collaborative approach to tourism promotion and the development of the industry. Clare Tourism was set up to take a lead in marketing with a steering group that consists of geographical and County Council representatives. Its activities are now carried out by Clare County Council and focus on providing a digital platform for the county's tourism offering. With the structure's marketing focus, it does not play an active role in destination management, although it provides an annual opportunity for networking.

As a result, there is a vacuum in governance and discussion at county level. This accentuates the perceived fragmentation between stakeholders in different areas of Clare and any disquiet regarding issues of trust and transparency between stakeholders. While the Public Participation Network offers potential to influence policy, what is needed is a much stronger structure that is solely focused on the dynamics of tourism and the issues that impact its competitiveness.

#### **STRATEGIC PRIORITIES:**

##### **1. Establish a county-wide Tourism Advisory Forum to strengthen governance and act as an advisory group for Clare County Council and a spokes-group for tourism.**

This Forum will bring together representatives from communities, existing tourism groups, industry, key agencies and will include Council tourism staff and an elected representative to work as a unified body. The Forum will provide advice on issues and opportunities facing the industry in Clare and will have an oversight role on the implementation of this Strategy.

The purpose of the Forum is to maintain a current and informed dialogue on tourism, strengthen links between stakeholder groups, and provide advice and guidance to Council on issues, and potential programmes and policies that will affect tourism in a way that encourages a greater degree of co-design in policy making. In addition, the Forum should seek to support the identification and application of best practices, both from the activities of local groups and from elsewhere, to ensure that the development of tourism in Clare benefits from the insights of known success and current thinking. This county-wide focus will play an important role in creating a stronger sense of cohesion within the industry as a whole.

When relevant, the Forum should work with Clare County Council to establish working groups for the purpose of looking at specific issues.

Initial steps to be taken:

- Disband the existing Clare Tourism structure and establish the new Tourism Advisory Forum.
  - Appoint a chairperson from industry, with the County Council adopting the secretariat role.
  - Develop terms of reference for the Forum.
- ##### **2. Work towards positioning Clare as a destination to be recognised nationally and internationally for its commitment to responsible tourism and sustainability.**

The importance of operationalising principles of sustainability and ensuring that these principles are foundational to ongoing priorities relating to destination and industry development were repeated themes in the consultations for the development of

the Strategy. Placing sustainability at the core means embedding the ethos of responsible tourism in all tourism planning and development activities, and developing new mechanisms and policies to highlight this commitment.

- Establish a formalised county-wide commitment to the principles of sustainability.

The county already has exemplary practices in areas, such as the Burren and Cliffs of Moher Geopark Code of Practice for Sustainable Tourism and Loop Head Tourism's commitment to the principles of responsible tourism. This type of commitment needs to be extended to the whole county through formal recognition of the principles of responsible tourism by local government, and the development of mechanisms to support this recognition and to measure their impact.

Initial steps to be taken:

- Establish a working group to review existing work undertaken by the Global Geopark and related sustainability initiatives within the county, together with best practices from elsewhere.
- On the basis of the findings, develop a preferred approach to establishing a formalised commitment to advancing the principles of sustainability across the entire county.
- Review the United Nations Sustainable Development Goals to ensure alignment and to identify practical ways of advancing these goals through tourism. Work towards developing a set of indicators that would measure progress against these Goals.
- Develop a stakeholder education/communications programme to support wider engagement in this initiative.

- Encourage local discussion on the implications of a formalised commitment, and assist in providing structured opportunities for communities to consider the most sustainable way of advancing the development of tourism and balancing local priorities.
- Pursue the potential of Ennis becoming Ireland’s first ‘Climate Adaptive Town’ as outlined in *Ennis 2040*, and explore opportunities to leverage this beyond the town to the wider county.
- Explore opportunities for global recognition as a sustainable destination through a certification programme that will strengthen the commitment and elevate its status nationally and internationally.

### 3. Develop new and strengthen existing approaches to generating integrated and cross-sectoral partnerships in tourism locally and regionally.

Tourism has the potential to impact or be impacted by other economic sectors and land uses. A more structured approach to co-developing management and development strategies will result in a stronger sense of alignment between local sector interests.

- Continue to support and strengthen the Burren and Cliffs of Moher UNESCO Global Geopark as a model that has the potential to promote cross-community and cross-sectoral discussions in relation to the designated area.
  - Focus particularly on maintaining strong engagement with the farming community and the conservation sector, and promote successful engagement practices that are transferable to elsewhere in the county.
- Implement tools for cross-sectoral discussions across the county as tourism discussions arise.

#### CASE-STUDY / GOOD PRACTICE

##### Thompson Okanagan Region, British Columbia, Canada

A region’s journey toward sustainable tourism:

- 2012 – ten-year tourism strategy recommending developing and adopting a ‘charter of sustainability’.
- Initiated partnership-based efforts to assist local businesses and organisations understand and implement green tourism.
- 2017 – first destination in the Americas to earn the Biosphere Certification through the international Responsible Tourism Institute. The certification is aligned with the United Nation’s 17 Sustainable Development Goals and involved the region providing documented evidence against 137 indicators.
- The Biosphere Adhesion Programme allows tourism stakeholders within the region to be recognised and involved in the sustainability initiatives and deepens the overall commitment.
- Establishment of the Thompson Okanagan Biosphere Interdepartmental Committee with representatives from local and provincial governments, the regional health authority, electricity and water suppliers, educational institutions, Indigenous organisations, women’s agencies, agriculture, and tourism champions.
- 2018-19 – global recognition of the region’s achievements through an array of accolades that have included the World Travel & Tourism Council ‘Tourism for Tomorrow’ Destination Award and the World Travel Awards 2018 – World’s Responsible Tourism Award.
- 2020 – introduced the Regional Pledge – the *Seven Affirmations for Seven Generations* – guidelines for sustainable tourism based on Indigenous philosophy. This has been developed first and foremost for the consumer, then for industry, and finally as a showcase for the resident to see what the industry stands for.



## CASE-STUDY / GOOD PRACTICE

### Barcelona Declaration of Tourism and Cultural Heritage: “Better Places to Live, Better Places to Visit” October 2018

This Declaration was launched to improve the sustainability and competitiveness of the social and cultural impacts of tourism in Europe. It assumes a collective commitment of tourism stakeholders to the UNWTO Sustainable Development Goals and calls for the implementation of five principles:

- **Smart and inclusive governance** “what is good for residents is good for visitors” – highlighting the importance of community empowerment and participation within the broader mix of stakeholder involvement.
- **Adding value to the sense of place** – recognising that cultural heritage is strongly rooted in the local community.
- **Using a holistic vision for marketing and preservation** – emphasising value over volume and considering corporate social responsibility.
- **Balancing place, people and business** – understanding carrying capacity and agreeing on appropriate indicators to better manage smart and sustainable destinations.
- **Connecting people to people** – building authentic experiences and positioning tourism as a ‘human activity’, not simply an ‘economic activity’.

#### 4. Continue to strengthen and support Clare County Council in its internal resources and capacity to develop and promote tourism.

This will include further restructuring of roles and responsibilities within the new tourism department. Initial steps to be taken:

- Reassess internal resources giving consideration to the following:
  - The need to provide ongoing stakeholder ‘education’ on how to utilise the Strategy in developing new and innovative experiences and the importance of moving away from more conventional models of ‘product’ development. This will involve strengthening internal resources to work with industry in building capacity and developing market-ready themed experiences, supporting business clusters and assisting communities in facilitating community-led tourism projects.
  - The need to appoint a marketing specialist with expertise in digital marketing. This specialist will have responsibility for leading the marketing and communications associated with external marketing and ‘internal’ industry communications, including the development of the web-based communications for related activities.
- Develop structured mechanisms for cross-departmental dialogue on tourism within Clare County Council. In particular, there should be regular discussions with the Economic Development Directorate, the Physical Development Directorate and the Senior Executive Officers for the Municipal Districts.

Tourism impacts and is impacted by a broad range of activities that cross-cut local government. Internal processes need to be established to review critical touch points on tourism between departments to maximise opportunities to influence decision making in relation to potential tourism interests. Regular cross-department dialogue will be important in strengthening the linkages between tourism policy and other areas of socio-cultural and economic policy, including land-use planning, urban renewal, heritage, digital connectivity and transportation.



## B. IMPROVE CONNECTIVITY

**We aspire to improve connectivity, recognising that it is fundamental to enhancing the competitiveness of Clare as a destination. There are many dimensions to connectivity, all of which are highlighted in the *National Planning Framework*, and laid out in further detail in the *Regional Spatial and Economic Strategy for the Southern Region*.**

**Connectivity relates to how our visitors get to Clare, how they move around Clare, how the entire community is connected digitally, how digital technologies are being used, and how inclusive we are. It significantly impacts on the quality of the visitor experience and is integral to developing Clare as a smart destination.**

Connectivity will always present a greater level of challenge outside of major urban areas. At the level of national and regional policy, the focus is firmly on addressing the disparities. These policies on mobility, technology and accessibility are aimed at revitalising rural areas, strengthening the networks of towns, improving quality of life, enhancing our international connectivity, supporting our transition to a lower carbon reliant society, and providing an improved platform for building a competitive, innovative and productive economy. Clearly, the intent of all of these policies reflect the aspirations of tourism stakeholders in Clare and should provide an increasingly supportive enabling context for the implementation of this Strategy.

The current situation is one of significant challenge, particularly in relation to the following:

- The decline in air routes into Shannon Airport over an extended period and the airport's relative weak connectivity with Europe;
- Limited public transport services within the county;
- Weak infrastructure for safe active travel;
- Digital connectivity issues in rural areas that undermine the competitiveness of small and medium sized businesses.

In addition to these constraints, industry and societal trends are likely to further contribute to the need to improve connectivity as the digital economy becomes increasingly significant in shaping how we live, access information and make decisions, and as we transition toward a low carbon economy.

## STRATEGIC PRIORITIES

### 5. **Work collaboratively with Shannon Airport to secure and sustain new routes that will improve air connectivity to the west of Ireland and increase air arrivals.**

The recent analysis of air connectivity into the region highlights the vital role that Shannon Airport could play in the future economic prosperity of the region. With the growth of air arrivals through Dublin International Airport at the expense of Shannon, there is an urgent need to work strategically and collaboratively to advocate for a greater level of government support and to identify ways of pursuing new routes, while sustaining existing routes. To be effective, a partnership inclusive of Clare County, Limerick City and County, and Galway County Councils, combined with business interests (such as Chambers of Commerce), should be established to support Shannon Airport in advocacy and in developing and sustaining routes.

- Establish the Airport partnership alliance.
- Work with Government and advocate for Shannon Airport to be a key and integrated element of Ireland's aviation policy, eligible for the regional airport state funding programme and seen as pivotal in achieving greater regional development in the Atlantic Western Corridor.
- Work collaboratively with Tourism Ireland on marketing initiatives that will support new markets of origin.

- Assist the Shannon Group in the preparation of market feasibility reports on potential routes – assessing tourism and business composition.
- Work collaboratively with tour operators, Fáilte Ireland and tourism businesses to develop western and Clare-centric packages that will highlight the Airport as ‘gateway to the west’ and a hub for the Atlantic Corridor Initiative

#### 6. Explore the feasibility of attracting an appropriate segment of the cruise sector in a sustainable manner.

The Shannon Foynes Port is a tier 1 Port of National Significance and represents an international gateway by sea to the region. With the plans to significantly reduce the docking of cruise liners in Dublin (temporarily in favour of freight), the number arriving into the Shannon Estuary has been growing, although presently most are docking at the Limerick Docks.



Cliffs of Moher Coastal Walk Shuttle Service

#### 7. Develop and implement a public transportation strategy that addresses sustainable travel options designed to support tourism – focusing on enhancing connectivity between local destinations and providing visitors with viable mobility options.

This work should move forward in phases. It will need to address major issues associated with rurality and the shift in consumer behaviour, that includes trends of declining car ownership in younger populations. Identifying appropriate solutions will be challenging and there will be a need to pilot and assess the potential of a range of solutions as part of this phased work. Assessment needs to be from multiple perspectives that look at economic, social, and environmental benefits.

- Prepare an audit of all existing services, including rural taxi services and Local Link, public transportation links between Ennis and key destinations within the county, and between Shannon Airport and key destinations. Identify critical gaps.
- Conduct a comprehensive economic and social assessment of the pilot Cliffs of Moher shuttle bus initiative. Include an assessment of any data derived from the provision of shuttle services for the Dubai Irish Open in 2019.
- Establish a working group of stakeholders (academic partners, transportation partners, tourism groups/businesses and the public sector) to identify working practices from elsewhere and to determine potential solutions that would strengthen a seamless transportation system in County Clare.

- Assess the suitability of piloting relevant options. Solutions will need to consider sustainability factors (nature and type of energy consumption) and factors relating to efficiency, which will include a comprehensive assessment of new technologies in mobility management.
- Assess demand management opportunities to help optimise pilot initiatives and increase the initial viability of new solutions. This should include ways of incentivising public transportation options that will generate further benefit to local communities.
- Initiate work on improving the synchronisation of timetables and dovetailing of services – particularly rail and bus services.
- Explore and highlight opportunities to build new solutions around appropriate ride-sharing options, micro-transit services and/or community-led rural transport options. While these options may be focused primarily on local needs, consideration needs to be given to their suitability for improving visitor mobility.

The EU SMARTA 2 Sustainable Rural Mobility project provides a forum for discussion of best practices and building knowledge on sustainable mobility – <https://ruralsharedmobility.eu/>

- As synchronisation improves and new solutions emerge, develop and promote an appropriate smart phone app for Clare public transportation that will support travel and assist visitors in using various services. Ideally an app facilitates planning, booking and paying for travel choices.
- As opportunities arise, support the transition to low emission or electric vehicles within the transportation system.

## CASE-STUDY / GOOD PRACTICE

### Texelhopper – Texel, Northern Netherlands

Texel is a sparsely populated Island in the North of The Netherlands with almost half of the 14,000 inhabitants living in the town of Den Burg. In the summer period the numbers grow with nearly 900,000 annual visitors. Initially the island was reliant on two traditional bus-lines and scattered small services.

In late 2014 Texelhopper was introduced as a subsidised pilot in response to the loss of rural transportation services. Today the service has been fully adopted and the island now offers a fixed route bus service supported by a minibus service with 130 well-signed pick-up points across the island. Buses normally drive between these points on request, but if a destination or origin is more than 500m from a bus-stop, the bus will pick up/drop off at that location.

There is strong local demand year-round for the service. This rises considerably in the summer months when over 50% of the riders are visitors. During initial set-up phase the delivery of the transport system was subcontracted to the local taxi-service.

The minibus routes have to be booked an hour before departure online or by telephone, and can be paid for in advance. A performant algorithm is in place that calculates the best routes to propose based on past usage. Since July 2018 Texelhopper has been integrated into the national system – Connexion. Today users travel with subscriptions, chip pin card or tickets.

At the outset of the pilot, a one-time funding of €1.7 million was provided to initiate the project, establish the ICT environment, raise awareness and subsidise the early years of operation.

- Review existing strategies and reports on traffic management and public transport that have been completed in recent years within Clare, and identify measures that need to be more closely evaluated as potential opportunities.
- Assess the current public transportation systems in relation to inclusivity and personal accessibility. This includes addressing concerns relating to public facilities and infrastructure at rail and bus stations, including toilets and access ramps.

The future of a viable transportation system lies in a suite of solutions. The impact of any particular solution may take time to become fully apparent, and this time must be built into the implementation process.

#### 8. Continue to work with local stakeholders to identify and address key traffic management concerns within north-west Clare (primarily the Geopark area).

Traffic management has been causing growing apprehension for a number of years. It was highlighted extensively in *The Burren and Cliffs of Moher Visitor Experience Development Plan (2019)* – with the growth in coach traffic being repeatedly noted as an issue of grave concern. This growth, which has primarily arisen from the substantial increase in out-of-county day coach travel to the Cliffs of Moher, is resulting in substantial traffic congestion, safety issues and pollution, and is negatively impacting the landscape aesthetics in peak season.

Congestion issues are aggravated by lack of enforcement of licensed stops, inadequate footpaths and local parking facilities in areas, and limited park and ride options. The viability of cycling as a local recreational and economic activity is being undermined,

and congestion pinch-points such as Blake's Corner in Ennistymon can create significant logistical issues. While this north-west area may be attracting increasing numbers of visitors, the spread of localised benefits can be marginal given the nature of tour bus activity and the focus on key attractions and select stops.

Looking forward, it is imperative that the social and natural capital of this part of the county is preserved. The Burren landscape is particularly prized for its ethereal beauty, and its aesthetic qualities must be preserved as they are integral to the destination experience and community livelihoods.

Compromising the integrity of these assets will undermine the future viability of tourism within the area. Addressing the traffic management issue is key to getting the balance right and will invariably be a particularly challenging issue given the spectrum of interests and perspectives involved.

Steps to be taken:

- Implement the Catalyst 1 action in *The Burren and Cliffs of Moher Visitor Experience Development Plan* which states *develop and implement an Integrated Traffic and Transport Strategy for the Burren and Cliffs of Moher*. In particular, focus on the following initiatives:
  - Undertake a cost-benefit analysis of the different segments of coach travel, and pursue all options to reduce coaches that fall below a determined yield threshold.
  - Ensure that new licensing and stop permit policies are firmly enforced.
  - Implement recommendations of the *Doolin Masterplan* to reduce the impact of bus traffic on the village and provide adequate enforcement of traffic regulations.

- Use the master-planning process for the Cliffs of Moher to thoroughly assess all alternative approaches to reducing traffic in this area, ensuring that local communities are fully engaged in the process and shared aspirations are respected.
- Develop a comprehensive understanding of traffic capacity within the Geopark area. Use this analysis to develop and implement an appropriate zoning policy.
  - Work with the National Transport Authority and the National Roads Authority to determine appropriate size of coaches for select roads, and to develop policies that would limit bus travel to coaches of suitable size, including the enforcement of licensing policies.
  - Fully assess the impact of developing a one-way coastal route for coaches and implement recommendations that arise from this assessment.
  - Work towards de-zoning minor/green roads and/or the enforcement of new lower speed regulations.
- Continue to explore ways of addressing traffic management issues associated with the Burren National Park, including car parking pinch points.
  - Support National Parks and Wildlife Services in the delivery of their park and ride service currently operating from Corofin Village to Mullagh Mór, and explore options to expand the service.
  - Ensure that the suitability of the approach roads to the National Park are fully assessed in the forthcoming 'route review' of the Wild Atlantic Way – to be undertaken in partnership with Fáilte Ireland.

Traffic management in general will need to be supported by a range of other initiatives designed to disperse visitors across the county in a sustainable manner, and increase the yield of those visiting Clare. Additional supportive measures will need to be pursued.

- Work with clusters of local communities to maintain an ongoing dialogue on traffic and transportation, and use this dialogue to regularly update local approaches to traffic management and to identify and/or address critical infrastructural needs.
  - Work collaboratively with community areas to ensure that appropriate measures are in place to address local needs and aspirations. Use this input to implement local traffic management frameworks for coach licensing, stop permits, and the development of related infrastructure.
  - The planning discussions highlighted a wide range of local parking needs. Community parking requirements should be looked at in the context of building stronger local economies, improving safety, and enhancing aesthetics. With the current need for social distancing, facilitating outdoor seating has the potential to further restrict parking options and will heighten the importance of assessing parking needs. Killaloe is a prime example of a community that needs additional parking to facilitate further retail and cultural development of the community, without compromising the aesthetics of the townscape. This will be addressed in the current planning process for the Killaloe-Ballina Town Enhancement and Mobility Plan.

Elsewhere, there is a specific need to address coach and bus parking needs in market towns, such as Ennistymon to facilitate longer dwell times

- Work with providers to increase the availability of electric charging stations.
- There is an untapped opportunity to work with communities in developing a stronger hub and spoke model, with Ennis serving as the primary hub. This has the potential to grow overnight spend, reduce the emphasis on day coach travel to Clare, and improve seasonality.
  - Work with tour operators, bus companies and the accommodation sector in Ennis to position Ennis as a key hub to explore Clare and to visit the Cliffs of Moher. Licensing policies should incentivise the growth of shuttle bus travel from Ennis.
  - Support smaller communities that are well positioned to engage in a similar hub and spoke model.
  - Work with the accommodation sector, particularly in Ennis, to promote a greater understanding on the wider benefits gained through attracting higher-value over-night coach business.

Enhanced traffic and transportation management includes a proactive and strategic approach to developing active transportation policies. The development of off-road trails for walking, hiking and cycling is a key element of effective planning for active and sustainable alternative modes of travel. This is addressed in Strategies 15 and 16.

## 9. Work with the Department of Transport, Tourism and Sport to promote timely completion of major transportation infrastructure projects and ancillary initiatives that have the capacity to strengthen tourism.

These projects include:

- The development of the M20 linking Cork to Limerick.
- The development of the Limerick Northern Distributor Road.
- The construction of the new Shannon Bridge Crossing and the development of the proposed Killaloe Bypass.
- The construction of the new bridge crossing in Ennistymon.
- The upgrade of the N19 road to Shannon Airport.
- The advancement of the N85 realignment project between Ennis and Lahinch.

In addition:

- Undertake a comprehensive review of brown tourist signage for the entire county. This review should pay particular attention to signage for self-drive visitors leaving Shannon Airport.

## 10. Work with partners at all levels to strengthen infrastructure and services that will enhance digital connectivity across the county.

The ongoing implementation of the *Clare Digital Strategy* will open up new opportunities to support the development of tourism and entrepreneurship in rural areas as part of a wider policy of rural regeneration. The Digital Strategy aims to establish Clare as a leader internationally in leveraging broadband and digital

technologies for rural regions, and has the potential to strengthen the impact of this Tourism Strategy significantly.

- Work closely with the County Council Broadband, Digital and IT Department to explore the transferability of ‘smart city’ technological advancements to rural areas, focusing on the concept of ‘intelligent communities’<sup>19</sup>. This includes identifying opportunities to progress mobilisation strategies in rural areas.
- In developing local skills and competencies, promote specific training in the application of digital technologies to rural tourism SMEs. Use this training to promote the uptake of broadband services where service availability exists.
  - Ensure that partners and County Council staff with a role in implementation, including the Local Enterprise Office all have a deep understanding of the synergies between digital communications and tourism development through a customised training and awareness programme.
  - Explore new approaches to leveraging the innovation hubs and the micro hub infrastructure, encouraging SMEs with limited current access to broadband services to utilise these resources.
  - Identify opportunities to support the tourism sector through continuing to facilitate options for remote working.

- Continue to assess the benefits in developing mobile broadband through working with industry to identify the potential of new mobile technologies in the enhancement of visitor experiences. This will complement the ongoing roll-out of free public Wi-Fi that has commenced in Ennis.

## 11. Raise awareness and support for initiatives that will assist in creating a more accessible and inclusive destination.

The emphasis on sustainability and the United Nations’ 17 Sustainable Development Goals have inspired a strong focus on full inclusion and accessibility and a commitment to creating equal opportunity and participation for people with different abilities. This has been referenced in relation to public transportation bus and rail facilities in Strategy 7, but should go well beyond to become an embedded ethos.

- Continue to implement the *Clare Age Friendly Strategy 2018 – 2022*. Many of its recommendations will improve accessibility issues within public spaces and attractions.
- Support businesses in developing accessible tourism products.
- Work with Access Ireland to review accessibility of key sites and address related issues with the objective of making tourism more inclusive and accessible.

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<sup>19</sup> Clare County Council, 2018, *Clare Digital Strategy 2023*.

## C. BUILD VIBRANT EXPERIENCES

**We aspire to deliver vibrant experiences that promote our experiential themes and differentiate Clare in the global marketplace. This will involve building a strong understanding of the narrative framework, using it as the basis for integrated planning on an ongoing basis, developing trails-related infrastructure to support the delivery of many of our experiences, and working together to create new compelling experiences.**

Delivering quality and immersive experiences that allow visitors to connect emotionally with the destination, each other, and themselves is fundamental to the growth of sustainable tourism. The process involves a spectrum of businesses, communities, local organisations and even our residents. This means that there needs to be a shared understanding of how to develop and deliver experiences, and how to work together to leverage our strengths and the successes of each other. Working collectively to identify what can be developed, and how to strengthen micro clusters to create smaller destinations within the county requires integrated planning. It needs a committed effort to highlight the story of Clare and to ensure that quality underwrites every aspect of the destination experience. Getting the experience right is ultimately a defining element of competitiveness.

## STRATEGIC PRIORITIES

### INTEGRATED PLANNING

#### **12. Build a strong understanding of the positioning narrative and use this narrative as the framework for experience development.**

The positioning narrative has identified four experiential themes that highlight the key assets and tourism resource strengths:

- Experience our **HOLISTIC LANDSCAPES**
- Explore our **HIGH TOWERS AND HIGH POWERS**
- Pursue our **ADVENTURE AND FAMILY FUN**
- Celebrate our **CREATIVE VITALITY**

The strengths that underly these themes are not unique to Clare, but taken together in this manner they create a distinctive story. Of equal importance, they provide a framework for collaboration and a cohesive approach to building dynamic HERO experiences that will strengthen the county's tourism offering in all markets<sup>19</sup>. This Strategy can be regarded as an initial step in articulating the narrative – the framework provides the basis for further defining the Clare brand.

- Work with a creative agency to continue refining the narrative with the intent of refreshing the Clare brand. This work should highlight the alignment between the Clare brand and both regional propositions – the Wild Atlantic Way and Ireland's Hidden Heartlands.
- Ensure that industry is familiar with the positioning narrative and that businesses have an understanding of how their products and services support the narrative.

<sup>19</sup> See Appendix



### 13. Collaborate with Fáilte Ireland and the communities to advance the work that has already commenced on planning for visitor experience development.

- Complete the Fáilte Ireland Wild Atlantic Way visitor experience development planning process along the remaining stretch of Atlantic coastline in Clare, ensuring that the outputs align with the four themes identified in this Strategy in addition to the Wild Atlantic Way branding. Use this process to identify localised infrastructural gaps that will need to be addressed to improve the quality and sustainability of the destination experience.
- Consolidate the planning work that has been undertaken for Lough Derg. This should include building awareness of the strategic priorities within the various plans and assisting local businesses in understanding the alignment between these regional priorities and the four themes in this Strategy.
  - ‘Map’ the alignment between the strategies and ensure that the implementation of each strategy is mutually reinforcing.
- Focus on promoting a collaborative approach to the implementation of *The Cliffs of Moher and Burren Global Geopark Visitor Experience Development Plan* and forthcoming visitor experience development plans. Continue to highlight the roles of the various agencies and stakeholders, and work with the implementation groups to measure and communicate progress.

### 14. Build the concept of sustainability firmly into ongoing planning processes for tourism and outdoor recreation.

- In conducting tourism and recreation planning processes during the forthcoming ten years, work towards adopting an ecosystem-based approach that assesses capacity of landscapes, communities, and natural resources to provide a basis for decision making that is firmly based on the principles of sustainability. Planning needs to consider:
    - Ecological integrity;
    - Societal well-being that looks at social, economic and cultural factors;
    - Governance and collaborative management.
  - Implement a planning model that is based on cumulative effects assessment to improve ability to manage for values and achieve desired outcomes. This will involve collaboratively identifying management objectives for ecological, social and cultural values, and then determining:
    - Potential effects of proposed developments on these values;
    - Impact limits and development thresholds;
    - Mechanisms for enforcing limits and thresholds, and mitigation strategies;
    - Appropriate monitoring mechanisms.
- An adoption of this approach will provide a framework to maintain alignment between strategic initiatives and community aspirations.

- Use this planning model to reassess visitor management policies for high-use sites and areas with related issues (including Poul nabrone and access to Burren National Park), and to determine access policies for areas such as Loop Head that are expressing concern over potential growth of coach traffic.

### TRAILS DEVELOPMENT

With the growth in ‘slow tourism’ and a heightened interest in activity holidays, trails are now regarded as a core asset in destinations. Clare has almost 1,100 kms of trails with at least 400kms representing walking trails with strong tourism potential and four National Waymarked Trails – the Burren Way, East Clare Way, Lough Derg Way, and Mid Clare Way. In light of this growth trend in trail-based activities and the existing and potential asset base within the county, the development of trails infrastructure is regarded as a key strategic priority in facilitating growth in tourism and new visitor experiences that will support the four experience elements.

### 15. Prioritise the development of the West Clare Rail Greenway.

This project was identified as the top priority initiative for the county within the planning discussions for this Strategy and should be regarded as **a game-changing project for Clare**. Creating an 85km multi-use Greenway for walking and cycling from Ennis to Kilrush as proposed in 2015 (and previously in 2006) will provide vital infrastructure for communities, and will be critical in supporting sustainable travel for local

residents and healthy living. Equally, visitors will benefit from new ways of exploring western Clare and communities can anticipate opportunities to strengthen local economies.

Clare is competing with other counties that have excellent greenway facilities including the Waterford Greenway and the Great Western Greenway in Co. Mayo. As greenways grow in popularity, it is imperative that the development of West Clare Rail Greenway is seen as a priority.

- Continue engaging with the Irish Farmers Association to establish agreed practice for planning and developing the West Clare Greenway.
- Move forward with the initial Kilrush to Kilkee pilot project<sup>20</sup> and use this project to establish a template for a more comprehensive master-planning process, and to define clear protocols and procedures for engaging affected landowners.
- Develop a communications strategy that can be tailored to meet the needs of various audiences. It will be critical to work with local communities and landowners to build a clear understanding of the benefits, potential opportunities and development process associated with the Greenway throughout the duration of the project – but particularly in the initial phase. Keep all communities well informed of progress.
- In conjunction with the pilot phase, adopt a consultative process to develop a masterplan for the entire route that considers:
  - The location and requirements of visitor access points including car parking requirements, public toilets, information needs and accessibility needs in general.

- Ecological integrity.
- Societal well-being that looks at social, economic and cultural factors.
- Governance and collaborative management.
- Connectivity with local trails and the potential for looped walks.
- Existing supporting infrastructure and services, including accommodation and supporting services for walkers and cyclists, together with an associated gap analysis.
- Opportunities to connect with existing and potential visitor experiences, and a preliminary assessment of local economic impact.
- Potential to enhance the Greenway experience through interpretation. This will require identifying key local and regional stories, including the story of the rail line itself, and ways of elevating the underlying thematic narrative of the county.
- Branding and signage/waymarking requirements, and general greenway infrastructure/furniture.
- Implications for user safety and trail maintenance.
- Opportunities to support and improve the visitor experience through technology.

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<sup>20</sup> Similar recommendation made in the *Kilrush Tourism Development Strategy 2019*

#### CASE-STUDY / GOOD PRACTICE

##### **Socioeconomic Impact of the Camino de Santiago**

The impact of the Camino de Santiago is particularly significant at the local level. Recent findings indicate:

- Each Euro spent by a pilgrim generates up to 11% of additional output and 18% of additional employment.
- While pilgrims represent only 2.3% of the total tourism expenditure in Galicia, each pilgrim has the same economic impact as 2.3 domestic visitors.
- In 2009 the French way accounted for 4.3% of the total hotel beds in Galicia. By 2017, this had risen to 8.7% with the way attracting 1,500 new hotel beds – representing 30% of all new hotel beds in the region.
- Social impact was regarded as ‘neutral’ without negative impacts, while cultural impact was seen as ‘positive’ particularly regarding the preservation and restoration of the cultural heritage.
- Positive environmental impact was noted relating to improved care of the local landscape and aesthetics of town centres.

Source: Xunta de Galicia, 2018 – research conducted by University of Santiago de Compostela

## 16. Develop a coordinated approach to the ongoing development and maintenance of the various trail network systems across Clare, including the four National Waymarked Trails.

Clare has four National Waymarked Trails – the Burren Way, East Clare Way, Lough Derg Way, and Mid Clare Way, in addition to an extensive number of local trail systems. These trails have the capacity to support all four experiential themes and represent an important tourism asset for the county.

The development, management and promotion of trails varies across the county. As a result, Clare is not fully leveraging its trail assets, and is not particularly well recognised for trail related experiences. The following actions provide the basis for a more focused approach to developing the infrastructure for trails-related experiences.

- Consolidate strategic oversight of trails through establishing a steering group that will provide a consistent and collaborative approach, and will oversee the direction of trails development. This group should represent existing interests including Clare Local Development Company which plays the most significant role, together with relevant local groups such as the 12 O’Clock Hills Committee, Clare Walks Ltd. and Loop Head Tourism, and public agencies including Clare County Council, NPWS and Coillte.
  - Formalise the structure of the steering group and prepare terms of reference.
  - Create mentorship pairings within the trails group that will assist in identifying and supporting the next generation of trails ambassadors.
- Consider extending the role of the CLDC Rural Recreation Officer to oversee trails development, maintenance, inspection and insurance over a much wider geographic remit, thereby providing a more consolidated approach. This would involve extending the organisation’s present tiered approach to trails management. At present, this allows for basic maintenance to be undertaken by landowners via the existing Walk Scheme, with the next level of maintenance being carried out through the Rural Social Scheme, involving Mountain Meitheal West for minor construction projects and contractors for major construction projects.
  - Extending this tiered approach will require enhancing resources for maintenance and working to maintain the existing Rural Social Scheme.
- Continue to identify best practice and innovation in trails development, management and promotion, and work to embrace relevant practices across the county. This includes extending the use of trail monitoring posts in identifying trails maintenance issues.
  - Implement the Cliffs of Moher Coastal Walk project in partnership with landowners to address safety, repairs and maintenance on this iconic trail, with particular emphasis on the 2km zone adjacent to the Visitor Centre.
- As part of the process of consolidating the approach to trails development, prepare a county strategy on recreation trails development. The work required for the preparation of this strategy will include a full audit of the various networks and trails, and a preliminary report on the current state of the entire network. In completing the assessment, a standardised audit tool should be used to review:
  - Current approach to management,
  - Signage and wayfinding,
  - Trails related furniture,
  - Access and parking,
  - Facilities at access points,
  - Potential to enhance connectivity with other trail systems,
  - Location of accommodation and related services for trail users,
  - Supporting services such as luggage transport services,
  - Off road versus on road and the potential to divert existing on-road stretches,
  - Environmental issues.
- Identify a classification of trails from National Waymarked Trails to local use trails, and highlight trails that are of high tourism value.
- Assess safety of existing on-road stretches and explore options to designate ‘green lanes’ and reduce vehicular speed. This will require consultation with local neighbourhoods to discuss and review the socio-economic benefits to be gained from ‘green lanes’.
- Identify appropriate usage for all trails, including mountain biking, equestrian, electric bikes and motorised trail bikes. Clarify policy statements and regulations where necessary.
- Highlight key opportunities to extend trails and/or develop connectivity between existing trails systems. Focus specifically on connectivity that adds value to existing higher profile networks.
  - In expanding networks, prepare a community consultation strategy to gather input on local perspectives on trails development.

- Continue to examine the potential of proposed trail initiatives and prioritise the projects that will clearly strengthen the county's profile as a destination offering exceptional trail experiences. Existing proposals include:
  - The Shannon Greenway with its potential to provide an off road experience linking Limerick to Tuamgraney and Scarriff, and potentially through to Mountshannon;
  - Further development of trails to support the Lough Derg Blueway;
  - A cliff walk from Quilty / Spanish Point to Doonbeg and Kilkee (which could become part of the wider Fáilte Ireland cliff walk initiative), including the Kilkee looped walk between Byrnes Head and Georges Head;
  - The Loop Head looped walks;
  - A trail system that will connect the proposed West Clare Greenway with Lough Derg.
  - The walkways and cycleways in the updated report on recreational trails in Ennis and Environs and the strengthening of a Green Infrastructure Network as outlined in the *Ballyallia Lake Amenity Enhancement Plan*.
- Improve the availability of trail-related data through developing methods to count trail users, including trail counters at strategic locations. Consider new partnerships with telecommunications companies to use mobile telephone data to support trails data collection.
- Establish a set of guidelines that will assist communities in developing new community-based trails. Highlight practices to mitigate against

environmental impact such as setback from riparian zones, and the use of appropriate surfacing materials

- Work with partners such as Leave No Trace Ireland to promote minimal impact principles.
- Identify existing trail-based events. Review the capacity of trails to be used in expanding or further developing new trail-focused events designed to create additional economic stimulus in rural communities.
- Encourage the private sector to leverage trails in the development of new trails-related experiences.
- Explore the viability of introducing a charge for car parking. The funds generated from such a fee should be re-invested in the management of trails, and visitors should be made aware of this intended use.
- Maintain dialogue on best practices and value of trails systems through forums that will enable networking among trails related stakeholders.
- Work on creating wider community awareness of trails that would encourage greater level of volunteer involvement, and explore alternative approaches to trails management that will assist in further maximising existing resources.
- Prepare a county-wide marketing plan for trails that will highlight the most effective mechanisms for building awareness and will reduce the current fragmented approach. Build on the existing visitor focused work of CLDC ([www.clare-getsidetracked.ie](http://www.clare-getsidetracked.ie)) and collaborate with Clare County Council to develop a consistent approach to marketing communications.

## CASE-STUDY / GOOD PRACTICE

### Shuswap Trails, British Columbia, Canada

The Shuswap Trail Alliance was formally incorporated as a legal non-profit society following a year-long study to consider how communities, organisations and governing bodies might work collaboratively toward a linked system of natural trail, hut-to-hut, and waterway routes for walking, hiking, mountain biking, Nordic skiing, snowshoeing, horseback riding, and paddling throughout the Shuswap region. The Alliance has since prepared a series of strategies and has formed the mechanism for cross-sectoral and inter-agency communication and decision making.

This has grown in significance as a model for leadership in trails development and the leveraging of financial and in-kind investment toward an agreed-upon regional vision. The organisation has established a Roundtable to implement the trails strategy through direction to a working group. The Roundtable has representation from a very broad range of stakeholders, and meets once a year to set direction, share information, and resolve disputes arising from access agreements. Operational implementation is led by the working group.

Over the past 13 years the Alliance has taken on over 350 trails projects, written or contributed to over 130 community trail plans and publications, developed 11 signature trail systems and 105 regional trails, engaged over 200 groups, organisations and businesses, and established an environmental adaptive trail monitoring system. With over 360 volunteers, the Alliance has become recognised as a provincial and national leader in the management and development of trails.

The Shuswap Trail Alliance has also taken a combined infrastructure/education/marketing approach to growing a true trails community, believing a trail is only as good as it is used and cared for, and it works in partnership with tourism organisations to promote the Shuswap for a wide range of trails experiences.



## THEMATIC EXPERIENCE DEVELOPMENT

The positioning narrative highlights four experience elements that represent the essence of Clare and what makes it appealing as a destination for international and domestic visitors alike. The assets that underlie these experience themes are largely in place – the trails, the land and water resources, the attractions and heritage sites, the intangible cultural heritage, the current festivals and events, and the activity operators and businesses involved in delivering existing experiences. The focus of the following themed overviews is primarily on consolidating priorities that have been identified, aligning them to the themes, and highlighting additional steps that arose from the planning discussions. Ongoing planning will continue to establish new priorities, and this section should be regarded as a work in progress. While the following projects and initiatives are associated with a specific theme, it should also be noted that these themes inter-relate.

### 17. Work collaboratively to support the development of theme-based experiences that align with the positioning narrative.

#### Experience our HOLISTIC LANDSCAPES

*The connectedness of our diverse landscapes is intriguing and the ..... aesthetic appeal is therapeutic and inspires well-being.*

#### a) Continue to elevate the international significance of the Burren and Cliffs of Moher UNESCO Global Geopark as a designated area renowned for distinctive geotourism experiences.

The Burren and Cliffs of Moher Global Geopark gives the county a strong basis for differentiation and for the development of geotourism. The designation offers a globally recognised brand that is all about *a holistic*

*concept of protection, education and sustainable development (UNESCO.org).*

- Work with the various partners identified in *The Burren and Cliffs of Moher Visitor Experience Development Plan* to implement the development of the Hero Experiences identified in the Plan.
- Complete the development of the Cliffs of Moher Strategy and the masterplan for the new and enhanced visitor and interpretive facilities, ensuring that the interpretation raises the profile of the Global Geopark and presents a story that will encourage the visitor to stay longer in Clare and explore elsewhere.
  - Support the Ben Ecotourism Network in their efforts to promote geotourism experiences throughout the Burren through their information desk at The Cliffs.
  - Use the Cliffs of Moher planning process to identify new geotourism experiences that highlight the global significance of north-west Clare.
- Support the implementation of the goals for the Burren and North Clare, as outlined in the shared vision statement between the National Parks and Wildlife Service and Clare County Council, including *promoting the development of ecotourism and agritourism; developing year-round sustainable tourism product; strengthening the integration of tourism and conservation; and having regard to relevant Management Plans.*
- Continue to develop and promote the looped Burren Discovery Trail, including the installation of the interpretive 'Doorway' structures in eight locations and directional signage.

- Support the Burren Centre in Kilfenora in its plans to revitalise the interpretive exhibits and strengthen its position as a gateway/orientation facility to the Burren and its range of geotourism experiences.
- Support the development of the Corofin Enhancement Strategy. This should include exploring opportunities to provide visitor facilities in Corofin that will complement the NPWS park and ride scheme, and assist in visitor orientation.
- Continue to ensure that all stakeholders and communities understand the significance of the UNESCO Global Geopark designation and the value of leveraging it.

#### **b) Integrate the theme of geotourism across Clare, and use ecotourism to expand the offering.**

There is significant potential to develop ecotourism throughout Clare, particularly in relation to its outstanding birdwatching opportunities that are currently under-developed and under-promoted.

- Move forward with community partners and sector interests to develop a strong ecotourism experience within the Shannon and Fergus estuarine areas through the implementation of the strategy: *Developing Nature-Based Tourism Opportunities on the Shannon Estuary Way* (2019).
  - Review the site-based recommendations and prioritise the infrastructural projects that are required to improve the experience for birdwatching – recognising that this area could become a leading birdwatching destination in Ireland.
  - Work with Fáilte Ireland to gain further benefit from the new Shannon Estuary Way driving route.

- Continue to promote experiences that leverage the internationally unique flora and fauna that can be found in Clare.
  - Work with the NPWS to explore options for developing recreational access and an ecotourism experience at Tullagher Lough and Bog SAC in West Clare. The experience concept is outlined in the *Pre-Feasibility Report* for the site prepared in 2020.
- Consolidate a county-wide birdwatching offering that highlights other key sites for ornithologists such as Loop Head, the Cliffs of Moher and Mountshannon.

#### **c) Strengthen the profile of wellness as a sector and well-being/vibrancy as the underlying promise to visitors that are looking to Discover Clare.**

The Wellness Tourism Association defines a wellness destination as *a geographical area that fosters and promotes wellness as an integral part of life within the community and economics of the region*. As transformational travel grows, the expectation that travel will refresh and rejuvenate mind, body and spirit is growing. Research on megatrends are increasingly noting its significance<sup>21</sup>. The wellness paradigm focuses on optimising well-being through a proactive approach to life and wellness.

And, yet, at the regional/county destination level within Ireland, this niche space has gone largely unclaimed, in turn creating a significant opportunity for Clare. The county has the natural and cultural assets – the diversity of landscapes and the healing power of nature; the heritage of spirituality; ease of access to a wide range of land and water-based

activities that range from contemplative to adrenalin focused; holistic therapy and wellness offerings; the creative elements that add to the *joie de vivre*; an underlying focus on sustainability; and a tradition in spa and wellness – all of which need to be explored in the context of developing a focus on wellness.

- Establish a working group to develop a clear framework for strengthening and promoting Clare as a wellness destination – a destination that can leave its visitors feeling *vibrant*.
  - Create an inventory of all existing assets and related businesses. Examine the opportunities to create a seamless service chain between businesses to permit coordination of services for the visitor.
  - Recognise the importance of promoting the *holistic landscape* – including clean water, clean air, and its aesthetics and peacefulness as integral to the wellness offering.
  - Identify and promote indigenous/traditional health treatments, together with activities such as mindfulness and forest bathing as ways of reinforcing the healing power of nature.
  - Explore how the three other experiential themes in the positioning narrative can be used to strengthen the concept of feeling *vibrant*.
- Support the community efforts in Lisdoonvarna to restore the Victorian Spa Wells complex, including the renovation of the Victorian Neo-Gothic style Maiville House, the Victorian Gardens and Pump

<sup>21</sup> Examples include: Euromonitor, 2019, *2019 Megatrends*; Skift, 2020, *Megatrends – Defining Travel in 2020*; work of the Global Wellness Institute

Room, the 1940's neo-classical Bath House, and the 1970's Ballroom. Lisdoonvarna was once Ireland's premier wellness town and this project has the potential to re-create this unique selling proposition and to solidify Clare's position as a wellness destination that enables its visitors to *feel vibrant*.

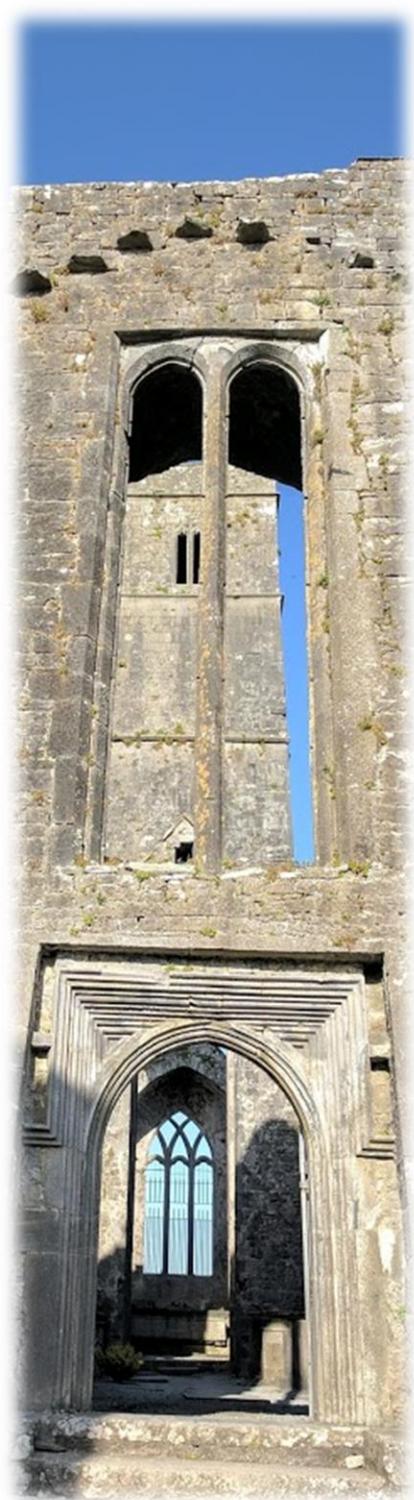
- To leverage this USP, it will be essential to raise the profile of wellness experiences within North-West Clare.
- Support the work of the GAA in spearheading the new *Going Well* initiative. *WeLL* refers to the combination of Wellbeing and Lifelong Learning and is based on the UN Goals for Sustainable Development.
  - Support Lisdoonvarna in becoming Ireland's first *Going Well* town and work with the GAA and communities throughout Clare to establish Clare as Ireland's first *Going Well* county.
  - Work with *Going Well* to promote the Michael Cusack Centre as a centre of excellence and training base for the roll out of this programme.
- Integrate the theme of wellness into the planned renovation, enhancement and upgrade of the visitor experience at the Vandeleur Walled Garden Centre in Kilrush.
- Explore how to further develop the UNESCO Global Geopark concept of Health and Wellbeing through Creative and Active Engagement that was highlighted in the English Riviera Declaration in 2016, within the Geopark.
  - Highlight the inter-relationship between landscape appreciation, physical activity, Burren local foods, community interactions and the concept of health and wellness.



- Consider working with local schools within the Geopark to develop creative outputs that can be appreciated by visitors, and highlight the wellness theme associated with the landscape.
- Develop a business advisory/mentorship programme that assists businesses in looking at how wellness can be addressed in their business. Quality, safety, authenticity and local produce are

all elements that can strengthen the appeal of supporting tourism services.

- Explore new options for foraging for wild foods and related culinary activities, with a particular focus on wild products known to have specific health benefits.
- Work with relevant organisations to attract health and wellness related conferences to the county.



### Explore our HIGH TOWERS AND HIGH POWERS

*This is a culture-scape of remarkable spirituality, power and influence.... a land of medieval legend that continues to intrigue and inspire visitors and locals alike.*

While the stories that lie behind *high towers and high powers* are compelling, the telling of them is fragmented and the connectivity between them can be challenging to grasp. Key sites such as Bunratty Castle and Scattery Island excel at delivering an immersive experience, but the wider story can be difficult for the visitor to piece together in a meaningful way.

#### d) Work with emerging initiatives that are focused on bringing together medieval and pilgrimage routes to tell a joined-up story.

- Leverage the common theme of ‘journey and adventures’ that underlies the forthcoming Tourism Masterplan for the Shannon; the *Destination Lough Derg Strategy 2019-2022* and its emphasis on *journeys across lake waters*; and the proposed 456km ‘Pilgrim Way’ which could eventually stretch from Kerry to Donegal with a strong focus on Early Medieval heritage.
  - Develop the ‘story board’ for Clare that will inform ongoing developments of interpretive facilities and services. The story board should highlight how the sites are interconnected – the interplay between the monastic system and the ruling families, the drama and setbacks associated with Viking plunders, and the overall evolution of the medieval landscape in a way that allows the visitor to read the landscape.
  - Continue to work with partners to connect the sites and stories through driving routes, walking trails, blueways and proposed itineraries.

- As the concept of the *Pilgrim Way* moves forward, work collaboratively to develop the experience clusters that are identified within Clare – the Shannon Estuary West and East Clusters and the Lough Derg South Cluster – three of a total of 13 clusters along the route<sup>22</sup>. Attention should focus on:

- Developing connectivity between the sites (the journey);
- Enhancing supporting services and leveraging the theming in the adjacent towns and villages;
- Working towards addressing the recommendations highlighted in the draft feasibility plan relating to access, conservation, experience development, marketing and promotion, and stakeholder training and awareness.

#### e) Implement existing plans and associated initiatives to raise the profile of iconic and supporting sites.

- Prioritise the implementation of the *Inis Cealtra Visitor Management and Sustainable Tourism Development Plan*. The development of a gateway visitor facility in Mountshannon is a key component of the Plan and will address the need for a new attraction to strengthen the East Clare visitor experience. The development of this immersive visitor experience is now underway.
  - Complete the development of a high quality and sustainable visitor experience in Mountshannon and use the facility to profile the *High Towers and High Powers* theme in East Clare.
  - Work with boating operators to ensure appropriate access to the island and the delivery of enhanced experiences.

<sup>22</sup> West Limerick Resources, Limerick LCDC & Partners, Draft Feasibility Study for Shannon & Erne Pilgrim Way (2020)



- Explore how the island and the visitor centre can tie in with other key heritage sites in East Clare and use the Inis Cealtra initiative to generate a greater level of awareness in the wider story.
  - Within this context, support the implementation of the proposed initiatives identified in the *Tuamgraney Community, Tourism and Cultural Development Study*. These initiatives will strengthen the *High Towers and High Powers* theme, and will increase the community's ability to leverage the other experiential themes and to become a key visitor hub on the Blueway.
  - Support the implementation of the *Bunratty Masterplan* and work with Shannon Heritage to place Bunratty Castle and Folk Park in the top 10 of the most visited attractions in Ireland.
    - Use the project to spearhead the adoption of innovation and new technologies in storytelling, and explore the transferability of interpretive approaches to other sites.
- f) Undertake feasibility research and development work to strengthen the theme of *High Towers and High Powers* at other key sites and locations.**
- Create an inventory of all key sites and assess the sites in terms of the current visitor experience, the historical significance and heritage characteristics, environmental considerations, and the potential of each to contribute to the destination experience.
    - Design a template and work with community and heritage groups to complete the inventory.
    - Engage in local discussions to explore further integration of sites into a wider heritage experience.

For example, discuss the potential to create alternative types of visitor access to the Killaloe Cathedral with the Diocese.

- Continue to preserve and promote the significance of Scattery Island as an island visitor attraction and place of national significance:
  - Further implement the *Inis Cathaigh, Scattery Island Conservation and Management Plan* under the direction and ownership of OPW.
  - Focus particularly on the ongoing preservation of the most vulnerable buildings, including the former dwellings, the ecclesiastical buildings and Keane's Castle, and the enhancement of the battery.
  - Strengthen the wider island experience through continuing to restore the historic pathways to create a network of themed looped walks; and assess opportunities to improve storytelling.
  - The hospitality services associated with the visit to the island are limited and opportunities to expand these should be explored.
- Undertake an assessment of how to elevate the story of Brian Ború and how to integrate related sites into the visitor experience. With the closure of the Brian Ború Centre, it is difficult to appreciate the significance of the story.
- Assess the theme of *High Towers and High Powers* in Ennis, and work to strengthen this theme as a key element of the visitor experience.





### Pursue our ADVENTURE AND FAMILY FUN

*The diverse geography of County Clare and backdrop of landscape offer a paradise for adventure.... adrenalin and family fun.*

#### g) Focus on developing a strong spectrum of fresh water-based recreation experiences on Lough Derg, highlighting the Lower Lough Derg as a signature destination within Ireland's Hidden Heartlands area.

- Work with Waterways Ireland to facilitate ongoing planning discussions and the identification of key projects. Assess the infrastructural and servicing requirements that need to be developed to build the Lower Lough Derg area as a preeminent water-based tourism destination, and to support the implementation of *The Lough Derg Destination Strategy 2019-2022* and the forthcoming Shannon Masterplan within County Clare. Initial emphasis should be on identifying projects that need to be moved forward. In particular focus on the following:
  - The development of facilities at O'Brien's Bridge to enhance water-based activities.
  - Business development initiatives that will encourage a growth in:
    - The provision of boat rental services within the area.
    - Boat taxi services that would improve cross-lake connectivity – for example from Dromaan Harbour to Dromineer and Garrykenny.
  - Appropriate slipways and pull-in points to improve the kayaking experience on the Blueway.
- Opportunities for wild and/or commercial camping to support kayaking as a touring activity – for example in the vicinity of Ogonnelloe.
- Business development initiatives that will improve the level of servicing for boaters, particularly in existing harbour areas, and will increase the appeal of Lough Derg as a base for boat touring.
- Work with boating operators to ensure sustainable access to sensitive sites, including Holy Island, and manage through permits or a licensing system.
- Work towards developing a recreation management plan for Lough Derg that will support sustainable use of the lake for boating, and the preservation of its ecological values.
  - Promote safety and environmental sustainability of all boating activities through a review of existing regulations and procedures to enforce these regulations. This may require policies that relate to spatial zoning of water use, and stronger enforcement of speed restrictions in multi-use of sensitive zones.
  - Work towards developing a code of conduct for recreational boaters that will support appropriate boating, strengthen awareness of the ecological values of the lough and its associated habitats, and will raise awareness of safety issues.
  - Implement a water quality monitoring programme.
  - Consider establishing a life-jacket loaner programme at key points of access.

- Explore the potential to further develop signature events that strengthen the positioning of Lough Derg as a boating and sailing destination – including events that highlight the Shannon-One-Design sailing dingy.
- Work towards the reopening and integration of the Errina Canal into the Lower Shannon/Lower Lough Derg water recreation experience. This would enable a direct navigable waterway connection between the Shannon Estuary, Limerick City and Belfast and would represent the reopening of the historic all-island waterway system.
  - Identify infrastructural projects required to support this integration of water systems.
  - Assess and highlight new opportunities for Clonlara and O’Briensbridge to support boating.
- Encourage the development of related and localised opportunities for water-based family fun throughout the county through a focus on amenity enhancement.
  - Support the implementation of *the Ballyallia Lake Amenity Enhancement Plan*.
  - Progress the proposals for the Ballaghfadda recreational park, and leverage its proximity to Ballybeg Lough

<sup>23</sup> NUI Galway, October 2019, *A Survey of Marine and Coastal Overseas Tourism Activity in Ireland*

<sup>24</sup> Irish Marine Federation, December 2018, *National Marine Planning Framework Baseline Report*

<sup>25</sup> Government of Ireland, November 2019, *National Marine Planning Framework Consultation Draft*

#### h) Strengthen marine-based recreation through working with communities and activity sectors on projects designed to enhance the role of this sector locally and regionally.

Recent research indicates that €1.94 billion was spent by overseas visitors holidaying in Ireland in coastal areas in 2018, with the marine tourism sector generating €650 million<sup>23</sup>. Research published by the Irish Marine Federation<sup>24</sup> cites data estimating that the average annual economic contribution arising from marina-based boats is between €10,500 and €21,000. These figures highlight the significant value of the sector and its potential to play a substantial role in the coastal areas of Clare. Participation of overseas visitors in water-based activities (marine and fresh water together) doubled from 97,000 in 2012 to 196,000 in 2016<sup>25</sup>.

However, both nationally and regionally there is an absence of a planning framework that looks critically at the growth opportunities associated with the marine tourism sector – a gap that should be addressed within Clare, given its significant stretch of coastal waters.

- Working within the context of the emerging National Marine Planning Framework, conduct a comprehensive assessment of the potential to grow marine-based recreation. This will require looking at:
  - Access to the coastline and associated constraints;
  - The existing supporting infrastructure;
  - Linkages and relevant factors relating to other sectors such as aquaculture, marine heritage, wastewater, and nature conservation;
  - The regulatory environment.

- Identify opportunities supporting, promoting or facilitating sustainable tourism and recreation activities that will add value to the local marine tourism sector, and develop a marine tourism plan based on the findings.

While the planning discussions did not permit time to fully assess the marine offering, the following initiatives can be highlighted:

- Work with partners in Kilrush to further develop Kilrush as a recognised destination for marine-based recreation through progressing the implementation of the *Kilrush Tourism Destination Development Strategy 2019* and building the Marina area as a micro destination.
  - Support the further development of Kilrush Marina on initiatives relating to expanding retail and hospitality services, and the provision of additional parking to service growing demand for marina related experiences, including the tours to Scatterry Island. This will have a beneficial impact on all local recreational businesses in the immediate vicinity.
  - Support related initiatives in the Kilrush strategy that are designed to enhance the appeal of Kilrush as a destination.
- Work with local communities to raise awareness of the value of the coastal environment and the need for stewardship. Use messaging to support community wardens and beach management committees in maintaining clean beaches and ensuring compliance with environmental management criteria.
- Continue to ensure that beaches have appropriate toilet facilities and litter receptacles.

**i) Continue to build a cycle-culture in Clare through working with local biking groups to raise the profile of different forms of biking and expand activity opportunities.**

The county has a number of well recognised on-road cycle routes such as the 150km Burren Cycle Route and the looped trails associated with the Doolin Cycle Hub, together with off-road opportunities for mountain biking such as the trails in Cahermurphy Woods near Doonbeg. In addition, local communities such as Kilrush are working towards making the town cycle-friendly and increasing overall participation in cycling to both improve well-being for local residents and to attract cyclists as visitors. The following recommendations will build on existing strengths, although it is recognised that a more comprehensive approach is required to develop the sector strategically.

- Continue to promote the ongoing development of safe, active transportation routes within and around communities.
- Highlight the value of rail trail cycling as a key benefit of developing the West Clare Rail Greenway – off road cycling will have a significant growth impact on the family cycling market, and this project is likely to be a game-changer.
- Continue to promote the need for support services for cyclists – accommodation and urban area lock-up facilities, rental and repair services, and transportation options. As cycling and mountain biking grow as demand generators, consider developing a ‘bike friendly business scheme’.
- Work collaboratively to strengthen Clare’s position on the Eurovelo 1 Atlantic Coast Route. The route traverses the county and is likely to be a significant demand generator.
  - Participate in Fáilte Ireland’s Atlantic on Bike initiative and work toward installing the necessary signage and related infrastructure along the designated route.
- Build on the work initiated by CLDC to install Strava signs. These signs have an integrated near field communication (NFC) chip that allow cyclists to compare their times with others and to upload their own times. This will increase the county’s appeal for cycling enthusiasts.
- Assess road suitability for cycling and enhance signage on rural routes that tend to be used by cyclists to promote multi-use of the roads and to encourage slower speeds. This action is particularly relevant to Loop Head and to sections of the East Clare Way.
- Support the development of a community regional bike share scheme and use the web portal to promote cycle itineraries that link attractions with cycle routes. (Clonakilty Bike Hire in West Cork is the first rural community bike hire scheme in the country and is largely facilitated by a number of hotels working cooperatively).
- Work with Coillte to further develop opportunities for mountain biking. With Coillte’s current focus on developing mountain biking nationally, Ireland is set to gain growing recognition as a destination for this activity.
  - Continue to promote and develop facilities at Cratloe Forest Recreation Area. Consider the potential for developing a mountain bike skills park within the Recreation Area.
  - Assess other opportunities for developing mountain biking trails, and create a stronger web presence for the activity.



**j) Re-establish Clare as an angling destination through a multi-faceted approach to improve access to good angling opportunities.**

Angling tourism in Clare has experienced a decline, particularly with regard to international anglers, and the county has lost its recognition as an angling destination despite its varied resource assets. Overseas media exposure is now limited, and the web presence of the activity sector is fragmented and weakly aligned with market needs. The focus now has to be on reversing this decline and repositioning the county as a destination for anglers.

Anglers tend to prefer a particular angling ‘discipline’ and tactics moving forward need to reflect this focus.

- Work with Inland Fisheries Ireland (IFI) and relevant partners to identify and address infrastructural requirements aimed at strengthening the angling opportunity.
- Work closely with IFI to re-engage media interest in the angling opportunity within Clare. Support IFI in their plans to initiate familiarisation trips to East Clare.
- Focus on highlighting Lough Derg as one of Ireland’s prime pike angling destinations which continues to be well serviced by experienced guides. Consider:
  - Hosting angling competitions on Lough Derg.
- Similarly, highlight the coarse angling product. This discipline is underdeveloped and needs to be supported by higher levels of service than are generally available. UK anglers, once a key market, have become more discerning in their expectations – guides and accommodation providers now need to provide a more comprehensive service – including guiding, pre-baiting, bait supply, boat hire and

access. (Note: there are exceptions with businesses that continue to offer a quality level of service.)

- Improve supporting tools, including the mapping of accessible lakes and streams. Trout angling in particular, will benefit from a mapping service given its more fragmented offering. The most well-known lake for trout is Lough Inchiquin.
  - Encourage local angling groups to work with IFI to produce a brochure and map identifying the key areas a visitor could go trout fishing for a day. This will be of value for the US market.
- Encourage new entrants into the sea angling sector, particularly within the Shannon area where waters are more sheltered and charter boats can operate on a greater number of days.
  - Promote the development of service providers in shore angling and guiding to meet an existing gap.
- Develop a consolidated and fully integrated web presence for angling. Anglers tend to research and plan their trip primarily using the internet. The demise of angling tourism in Clare partially reflects the weak and fragmented web presence.
  - Use the web portal to list all the angling services in the county. This will not only provide a single source of information, but it will show that Clare is once again serious about its position as an angling destination in the marketplace.
  - Assist operators with web and social media training and encourage businesses to improve their own digital presence.
  - Provide support for developing quality video content that covers the various disciplines and highlights trophy angling species such as Bluefin Tuna.

- Work with select accommodation businesses to develop specialised services and to improve the visibility of these services on the internet. In particular, there is a gap in top-quality angling establishments catering specifically for coarse anglers.
  - Identify all service providers offering a coarse/pike angling product and assess their offering across a number of criteria including facilities, angling knowledge and web/media skills with a view to identifying gaps that could be addressed through funding, training and/or partnering.

**k) Continue to work collaboratively to leverage Clare’s world-class golf resorts and courses.**

Golf in Clare is an important demand generator for the international market and provides significant potential to use as a lever to grow the value of tourism within the county. Only 11% of golf spend is on T-times, and the affluent golf market spends almost three times the equivalent of the leisure market<sup>26</sup> – which highlights the importance of leveraging the activity. As international players age, they are increasingly travelling with partners and playing slightly less golf.

- Work with the golf sector to create innovative itineraries and quality bespoke experience packages for their guests.
- With the approach of the Ryder Cup in 2026 at Adare Manor, continue to improve the supporting accommodation that will be used by visitors.
- Work with Tourism Ireland and Fáilte Ireland to leverage public relations activity.

<sup>26</sup> Correspondence with Fáilte Ireland, February 2020.

**l) Continue to work in partnership with special interest groups to attract sports events that will support Clare’s positioning as a destination for adventure and will highlight its range of land and water-based outdoor activities.**

Sports/activity events and adventure/endurance events have seen rapid growth worldwide. A range of factors underlie this trend including the impact of social media; the desire for ‘kudas’ associated with completing more extreme events; a greater level of inclusion; the pursuit of wellness and a greater focus on self-improvement; and a shift in how people consume sports – moving away from traditional sports to ‘doorstep’ sports – (again partially driven by online training tools and communities). With this trend, there is now a significant opportunity for Clare to build on the surge of interest in cycling, swimming, triathlon and adventure racing, in addition to more traditional sports events.

- Continue to support key events that are currently hosted in Clare, such as the ŠKODA Ring of Clare Cycle; Tour de Burren; the Kilkee Hell of the West Triathlon; the Burren Marathon; and Quest Lough Derg.
- Work with sports and community groups to identify new sports/adventure events that will align with existing activities – particularly in the water-based sector. Continue to build profile for existing events such as the Dragon Boat race.
- Encourage communities and businesses to create packages and activities that would promote an extended stay in the area.
- Work with hosting organisations to improve seamless booking, including the ability to book additional experiences.





### Celebrate our CREATIVE VITALITY

*A place where our zest for life is highlighted in our banners, celebrated in our traditional music, expressed in our poetry, song, craft and sport, and savoured in our local food. A vitality that embraces both our innovation and our commitment to tradition.*

#### m) Promote the ongoing development of Clare as the county of traditional music through supporting events and experiences that highlight this aspect of Clare's culture.

- Leverage the unofficial positioning of Ennis as 'Ireland's TradTown'.
  - Continue to develop Fleadh Nua as a signature event for Clare/Ennis through:
    - Further animating the streets and utilising space at the Fair Green and Abbey Street for gig rig. Close and pedestrianise select streets in the evening and encourage a sense of 'open house' with all businesses in the select area open.
    - Provide day trips from Ennis during the event to disperse the benefits and add value to the event. Work with other towns and villages to offer mini-events that complement the Fleadh Nua. Gradually work towards a county-wide signature event, while retaining the hub of the event in Ennis.
- Work with local communities, musicians and community groups to develop immersive learning experiences and position Clare as the county that specialises in teaching traditional music skills.

#### n) Work with communities across the county to support and develop existing and new festivals and events that highlight this creative vitality and *joie de vivre*.

There is a very impressive and extensive range of eclectic festivals and events throughout the year that already play a significant role in the local economy, and are critical to dispersing visitors and generating demand out of peak season. Examples illustrating the diversity include the Corofin Traditional Festival, the Killaloe Chamber Music Festival, the Doolin Folk Festival, the West Clare Drama Festival, the Lisdoonvarna Matchmaker Festival, the Willie Clancy Summer School, and the Feakle Traditional Music Festival. These festivals portray the spirit of Clare today.

- Continue to support and develop festivals and events that highlight the positioning narrative for Clare.
  - Explore opportunities to use festivals and events to extend the season and attract visitors year-round.
  - Develop support tools, such as volunteer management tools, communications and social media tools to assist event organisers, and tactics to improve the 'greening' of events.
  - Encourage event organisers to collect data that will assist in calculating the economic impact of events.
- Work with communities to complete a SWOT analysis of their hosting capacity and existing festivals and events. Identify key issues that need to be addressed.
  - Where public transportation has become a constraint on the local evening economy, work with communities to identify new solutions through the wider discussions on public transportation.

**o) Support the ongoing development of arts and crafts.**

- Develop a tourist trail that brings together multiple elements of the Clare landscape and contemporary culture, including music, food, and craft.
- Look at the option of restoring older buildings in villages as art and craft centres.
- Include a local craft presence in the proposed Doolin Visitor Centre.
- Work with artists and craft artisans to explore opportunities to further develop learning experiences and workshops.

**p) Highlight and capitalise on the county's 'heritage' sports and stories of sporting significance.**

- Work with GAA clubs to develop experiences that would make GAA games more accessible to visitors.
  - Highlight the connections between the GAA and overseas sports including ice hockey, baseball and rounders.
  - Further explore the concept of establishing a National Centre for Intangible Cultural Heritage at Bunratty Village to mark UNESCO inscription of Hurling on the Representative List of the Intangible Cultural Heritage of Humanity, together with the Uilleann Piping and Irish Harping.
- Work with the Tuamgraney Handball Club and the wider community to elevate the national significance of Tuamgraney in the story of handball through implementation of the related recommendations in the *Tuamgraney Community, Tourism and Cultural Development Study*.

**q) Work with food and drink producers and the culinary/hospitality sector to build food and local flavours as a key attractor in Clare.**

The ability of food and drink to add significant value to the destination experience and to act as an attractor varies across the county. Its role as a key element of the destination is exemplary in the Burren with the Burren Food Trail, the Burren Slow Food Festival and the Burren Food Fayre, and the work of this area of Clare should be used to provide guidelines for elsewhere.

- Work on developing a strong network between local suppliers and restaurants, including the artisan retail sector. There is the potential to focus on creating 'flavours of the landscape' through bringing out local flavours that reflect the immediate locale.
  - Explore mechanisms to assist restaurants with purchasing produce from local producers.
- Work with the food and drink sector to create a vibrant brand that will raise the profile of Clare's local flavours.
- Encourage a greater presence of the 'farm to table' concept throughout Clare
- Continue to build recognition for local food and drink through events, and through building a stronger food component within other activities and experiences.
  - Support the new Clare Food & Drink Fleadh in Ennis and use the festival to raise the profile of the culinary experience in Ennis.
- Work with the farm sector to explore opportunities to build farm-related experiences and/or open farm events. This may require developing a specific mentorship programme to assist farmers in building

a business plan around new complementary experiences.

- Encourage a strong presence of local foods and artisan foods at farmers' markets, and promote 'buy local' particularly for the self-catering market.
  - Encourage the major grocery stores to promote the visibility of local foods. (This is exceptionally well done by SuperValue in Skibbereen and Clonakilty).
- r) Celebrate the county's innovative industrial heritage and its current areas of excellence in other economic sectors.**

The creative vitality of Clare is equally evident in its stories of innovation and success over time. This element of the county's heritage is under-represented in the destination experience, and many visitors leave with limited understanding of the significant role Clare has played and continues to play in the prosperity and development of the country.

- Work with the Electricity Supply Board (ESB) and relevant partners including Fáilte Ireland and the University of Limerick to advance the concept of developing a national scale tourist attraction at Ardnacrusha that focuses on its legacy in renewable energy and electrifying the country, and its value in relation to industrial architectural heritage.
  - There are a series of related past- and forward-looking interpretive themes that can be developed here including:
    - The history of hydroelectric power and the electrification of Ireland;
    - The story of the Shannon River;
    - Climate change and the role of renewable energy.

- Continue to explore the feasibility of developing a world class commercial educational and training centre specialising in marine science, renewable energy and climate change research and training at Cahercon, that further enhances Clare’s national and global role in innovation and attracts a new visitor market year-round.
- Support additional concepts that highlight the story of innovation, such as the planned expansion of the Shannon Aviation Museum to become a key all-weather, interactive attraction promoting Shannon’s rich aviation heritage and global contribution.

**s) Work towards developing craftsman experiences that focus on skills development in conservation and traditional building.**

With the co-existence of innovation and tradition that characterises Clare, there is potential to develop experiences that are based on the concept of short master classes in building conservation and traditional building repair. With the current emphasis on climate change and sustainability, there is a gap in national skills relating to the reuse of older buildings and energy conservation within these buildings.

- Explore the potential market to develop a centre of excellence within rural Clare designed to offer short courses in traditional building restoration and conservation – either as professional development or for the leisure market. Work with partners such as the Heritage Council to develop the concept.
  - There is considerable scope to expand this into other traditional rural skills such as black-smithing and traditional joinery.
  - The focus on heritage conservation could be extended to other disciplines such as horticulture, with partners such as the Irish Seed Savers Association.
- Explore the opportunity to use this type of programme to advance the restoration of buildings and artefacts associated with Clare’s industrial heritage, such as the lime kilns and former iron works.
- Use initiatives of this nature to create a greater level of awareness of Clare’s distinctive built heritage, including its diverse bridge structures.



## D. ENHANCE SUPPORTING INFRASTRUCTURE AND KNOWLEDGE

We aspire to support the sustainable growth of tourism in Clare through promoting, encouraging and facilitating the development of supporting infrastructure that will heighten the competitive appeal of the destination and attract new markets. We recognise the need for a strong sense of place, and the importance of developing attractive hubs with quality accommodation and facilities throughout Clare that will entice our visitors to stay longer and explore the surrounding area.

We appreciate that the delivery of our vibrant experiences requires a well-informed industry – one that understands market trends, knows how to deliver a compelling experience, is familiar with best practices and has the capacity to outshine our competition. This will require working collectively to enhance the critical knowledge base of the industry and all partners

### STRATEGIC PRIORITIES

#### SUPPORTING INFRASTRUCTURE

##### 18. Undertake a comprehensive assessment of hotel and visitor accommodation and develop an accommodation strategy to support the growth of overnight visitation.

The growth in the value of tourism is currently constrained by the high ratio of day visitors to the county and by the weaknesses that have become inherent within the accommodation sector. The issues associated with the accommodation offering vary considerably, and while there are examples of excellent facilities, many communities are facing structural constraints in this sector that are hindering the growth of overnight visitor spend.

- Undertake a comprehensive assessment of all accommodation elements across the county, including the camping sector. This assessment should include:
  - An audit of gaps in accommodation – range and diversity of offer, availability of rooms, quality of offer, accessibility, and supporting services.
  - An evaluation of non-registered accommodation offered on sharing platforms, particularly AirBnB to assess quantity, quality, and the extent to which it is contributing positively or otherwise to the wider socio-economic context.
  - A full assessment of performance vis-à-vis national trends that further highlights the underlying barriers and challenges, and evaluates the supply and demand outlook for the county, and prospects for growth. This evaluation needs to review trends in RevPAR (revenue per available room) and the widening gap between the Western Seaboard rates and the national average.

- A review of impediments to growth within the enabling context – planning policy, the impact of Brexit, access to capital, and related factors undermining investment in the current climate.
- Expand the existing Clare County Accommodation Investment Strategy Toolkit and ensure that it addresses the gaps and deficiencies. The strategy should highlight:
  - A summary of the assessment findings.
  - The investment opportunities as they relate to each area of Clare, including an overview of potential sites of interest and development opportunities, and the identification of potential iconic sites based on their location and surrounding environment. In particular, there is a need to address the lack of sufficient registered rooms that are graded at 4-star and above. Currently 61% of all registered rooms in Ireland are of this grade, while Clare has only 38% of its rooms in this category. Similarly, recognised gaps in RV camping facilities need to be addressed.
  - Internal return rates to support capital investment and potential for market growth.
  - Supportive policy mechanisms that need to be introduced to address key issues.
  - An identification of alternative approaches to developing accommodation and the viability of these models to address concerns.
  - Recommendations on the development of an incentivised support programme for quality improvements, including upgrades that will ‘green the business’ and enhance its environmental performance.
  - Recommendations on creating awareness of potential opportunities and attracting new investment, including an investor outreach initiative.

- Use forthcoming planning processes and related discussions to highlight needs and opportunities relating to accommodation requirements, including commercial camping infrastructure.
  - Prioritise this focus on providing modern quality tourist accommodation in Ennis as stated in *Ennis 2040* to improve its competitiveness as a county hub and gateway town to the county and the Wild Atlantic Way, and to expand on bed stock to meet high season demand.

#### 19. Develop the profile, experiences and infrastructure of Ennis as a core hub attraction and gateway to the county.

In positioning Ennis as the gateway to the county, a key hub for the Wild Atlantic Way and the main overnight destination within Clare, the competitiveness of the town as a destination needs to be strategically strengthened. Ennis should provide an exceptional experience in its own right that encourages overnight stays through its attractions, themed experiences, evening economy, retail, and ambiance.

- Accommodation and all related hospitality services are critical components of Ennis as a destination and need to be carefully assessed to ensure an appropriate range of price-points, quality assurance, and customer service. Addressing Strategy 18 within the context of Ennis will be particularly important in relation to the town's future success as an overnight destination, and its ability to compete with Limerick and Galway as city destinations.
- Continue to assess the feasibility of growing business tourism through developing new conference venues and encouraging an upgrade to existing facilities.

Conference venues with state-of-the-art facilities and quality accommodation for 300 to 400 sized groups in Ennis are lacking, which is undermining the town and the county's capacity to bid for business events. This gap in supporting infrastructure is well recognised and the need to address it is highlighted in *Ennis 2040*.

- Prioritise the implementation of recommendations in the forthcoming *Ennis 2040 Economic and Spatial Plan* that relate to regeneration of the town centre, with a particular focus on creating a strong sense of place, maintaining the integrity of heritage assets within the landscape and enhancing walkability.

An underlying goal of *Ennis 2040* is to make the town centre the 'beating heart of Ennis' – which in turn reflects the positioning of the county as a visitor destination. The *heartbeat of ancient stones* needs to be particularly vibrant in Ennis if it is to compete as key overnight destination on the Wild Atlantic Way.

- Undertake a comprehensive assessment of the Ennis visitor experience in relation to the four experiential themes, and identify steps to strengthen the immersive nature of the product offering. Particular opportunity exists in relation to the distinctive lanes and bow-ways.
- Focus on strengthening the 'evening economy'.
- Support the implementation of the forthcoming Ennis Niche Destination Town.
- Strengthen the orientation/gateway role of Ennis and ensure that the information needs of the visitor are adequately serviced, including through services provided by the accommodation sector, and through on-the-ground orientation signage.

- Enhance its role as a hub through developing new opportunities to assist visitors with trip planning/booking and to facilitate extended stays.
- Develop a marketing plan as part of *Ennis 2040* that clearly defines its brand proposition.
  - Continue to highlight and strengthen the appeal of Ennis as the 'boutique capital of Munster'.
  - Additional initiatives relating to Ennis are highlighted in 17 m) and 17 q).

#### 20. Work with community partners to strengthen the role of towns and villages elsewhere as destination hubs, through identifying infrastructural issues that constrain tourism and encouraging an ongoing improvement of infrastructure and enhancement of the public realm.

In addition to issues relating to broadband connectivity, there are a range of community infrastructural constraints that are weakening the ability of local communities and businesses to leverage opportunities for growth. In a number of instances these issues have been highlighted in local action plans, and efforts are now needed to develop measures to address these local concerns.

Similarly, a community's visual appearance and ambiance are competitive factors that impact the quality of the visitor experience. While there are a number of towns and villages that have a strong sense of place, there are others that have seen their original appeal decline over the years and are in need of public realm improvements.

- Work toward implementing the recommendations in the *Shannon and Environs Local Area Plan* and the new *Shannon Town Centre Spatial Masterplan* to enhance the town centre, strengthen the sense of arrival, and develop the green corridor between the town centre and the Shannon Estuary.



- Focus on communities that have the potential to act as gateways to key visitor attractions. In particular, explore opportunities to enhance Corofin as a gateway to the Burren National Park.
  - Continue to assess the availability and suitability of public infrastructure designed to support the visitor experience, including public toilets, street lighting, footpaths, litter receptacles, street furniture and signage. Identify local requirements and work collaboratively to develop local action plans that will facilitate addressing the deficiencies.
    - Develop ‘shelf-ready’ project plans and seek opportunities to address deficiencies through funding programmes as new funds become available – including the Government’s Town and Village Renewal Scheme and the Historic Towns Initiative (for designated Historic Towns).
    - Work with local partners to undertake a series of community signage audits and identify recommendations to address the key issues, particularly in high visitor footfall areas and in the vicinities of popular visitor attractions.
    - Ensure that existing signage plans have been adequately implemented, including the *Signage Plan for Visitor Attractions in the Burren*.
  - Maintain efforts towards protecting the visual character of communities and maximising their tourism potential by the continuation of environmental and public realm programmes, litter control, planning initiatives, design management and improvement of identified derelict sites (CDP9.14)<sup>27</sup>.
    - Work with Clare County Council to explore opportunities for business incentives that will improve the streetscape. Use planning processes such as the *Cappa Enhancement Strategy* to support the implementation of this Strategy.
- In implementing the *Litter Management Plan 2019 – 2021*, strengthen awareness regarding the detrimental impact of litter on the tourism experience and ultimately local benefits arising from tourism.
  - Promote awareness of Fáilte Ireland’s *Development Guidelines for Tourism Destination Towns* (2019) which highlights a wide range of factors that need to be considered in enhancing the market appeal of a local community as a destination, including public realm, the evening economy, retail, hospitality services, and events and festivals.
- Support the public infrastructure developments that are required to facilitate the full implementation of the *Bunratty Castle and Folk Park Master Plan*, and the site’s aspirations to become a national attraction of scale.
  - Work with Irish Water to assess the adequacy of water and wastewater facilities in smaller rural hub communities, and address significant deficiencies with the installation of modern treatment facilities. Examples of communities that identified the issue as a constraint to the expansion of tourism facilities include Doolin, Carrigaholt, Killaloe, Tuamgraney, Kilrush, Broadford and Cooraclare.
  - Complete the implementation of the Doolin Pier and Village Masterplan and the development of the multi-functional Doolin Pier Visitor Centre, while working with local stakeholders to alleviate existing concerns regarding any potential impact on the sustainability of local businesses.

<sup>27</sup> Clare County Development Plan 2017-2023.

## KNOWLEDGE AND CAPACITY

### 21. Work with Fáilte Ireland and related partners to deliver a bespoke business support programme that will enhance the capacity of industry to develop, deliver and market saleable experiences.

- Expand the business support programme that is being developed for businesses on the Wild Atlantic Way to be inclusive of the entire county, and integrate elements of current programmes, such as the Global Geopark's geology course where geographically relevant. The programme should have a strong mentorship element, and should focus on:
  - Understanding the positioning themes outlined in this Strategy and the stories that underly the themes, including key aspects of the county's geology, ecology, and cultural heritage.
  - How to integrate stories into the promotion and delivery of experiences.
  - Quality and service excellence.
  - Pricing and creating saleable experiences.
  - Selling online and opportunities relating to working with tour operators.
- Develop a training programme for hotel owners and managers through partnership initiatives and focus on performance and revenue management, with the goal of attracting quality 'free independent travellers' (FIT) and niche upmarket group business to the county, and moving away from lower-yield markets.
- Identify clusters of businesses that would potentially benefit from working together and assess the specific needs of the cluster. Tailor mentorship and support programmes accordingly.

- Encourage businesses to engage in Fáilte Ireland's accredited suite of Operational Excellence programmes. These include:
  - Accredited Service Excellence,
  - Enhancing Management and Supervisory Skills,
  - Developing and Implementing Standards of Performance.

Encourage clusters of businesses to engage in the programmes as certification can also be awarded to a destination or community on the basis of an agreed number of key businesses participating successfully in the programme.

- Encourage businesses to work closely with Fáilte Ireland to market test emerging concepts.
  - Leverage the existing work that is taking place relating to the creation of rural enterprise hubs, and use these hubs to offer incubator services that will meet the needs of existing rural businesses and stimulate potential start-ups.
- ### 22. Support the development of the positioning themes through curating stories and working with relevant partners to advance local knowledge.
- Encourage the development of local initiatives that will assist in the collection and curation of stories.
    - Work with local historical societies, the County Council Heritage Officer, environmental interest groups and related community groups to identify stories and develop a deeper understanding of the county's inherent geographic characteristics.
    - Develop opportunities to share stories and local knowledge and to build an understanding of how to use them effectively.

- Review the assessment work on landscape character and seascapes that was completed in 2004 and identify ways of enhancing this material and making it more available/user-friendly to industry as a resource. These reports have considerable potential to be a valuable resource, but awareness and use of them in this context is likely to be very limited.
- Consider using the mapping work completed to date for this Strategy as a basis for curating elements of the storied content.

### 23. Explore opportunities to network with new partners, including non traditional partners and academic institutions, to engage in knowledge sharing and the identification of innovative thinking.

- Establish regular dialogue with neighbouring county council tourism representatives, international partners and relevant stakeholders to identify partnership opportunities and assess implementation of existing multi-jurisdictional projects.
- Establish a mechanism to encourage dialogue between universities/academic institutions with an interest in tourism, and/or an interest in the physical and cultural heritage of Clare. The Global Geopark has benefitted from involvement of academic specialists, and building on these research interests can create valuable synergy.
- Continue to explore the benefits of establishing strategic partnerships with specific Global Geoparks and ensure that the learnings from the Global Geoparks Network and the European Geoparks Network events are well disseminated.

- As the South Clare Economic Strategic Development Zone initiative moves forward, identify partners with a strong interest in new technologies and work with these partners to explore appropriate options for enhancing Clare’s profile as a smart destination.
- Become a member of the Network of European Regions for a Sustainable and Competitive Tourism (NECStouR)

This network brings 36 regions of Europe together with 30 tourism related academic organisations and research institutes and representatives of sustainable and responsible tourism business associations. In working toward strengthening tourism within destinations, it highlights the importance of creating the right balance between the welfare of tourists, the needs of the natural and cultural environment, and the development and competitiveness of destinations and businesses. NECStouR focuses on increasing knowledge and expertise through collecting, exchanging and evaluating good practices and joint activities, and is at the forefront of European tourism policy lobbying to strengthen the presence of regional destinations. Currently Donegal County Council is the only member from Ireland.



## E. CREATE AWARENESS

We aspire to deliver a destination experience that will leave our visitors feeling *vibrant*. We invite our visitors to *discover Clare* through presenting a unified message that profiles the entire county – one that brings our narrative to life – through messaging and digital tools that will inspire trip planning. When our visitor arrives, our communications will motivate further discoveries, encouraging each person to make the most of their time in Clare.

Our internal communications will focus on building a sense of cohesion within the tourism community, developing a strong understanding of what matters to industry, and ensuring that our stakeholders are well-informed and well-prepared to respond to new opportunities and to unexpected crises.

### STRATEGIC PRIORITIES

#### MARKETING COMMUNICATIONS - EXTERNAL

**24. Refresh the destination brand and adopt a thematic approach to marketing and communications that promotes the key themes, highlights sustainability as a core value of Clare as a destination, and is aligned with the regional propositions – Ireland’s Wild Atlantic Way and Ireland’s Hidden Heartlands.**

- Refresh the existing brand to highlight the promise of *feel vibrant*.
- Develop a marketing plan that supports the positioning.

With Tourism Ireland and Fáilte Ireland taking the lead in the marketing and promotions of Ireland in the overseas markets, the main focus of Clare County Council as the lead agency in marketing the destination, is to align with the national brand and regional propositions.

- Work on an ongoing basis with partners to develop and maintain a comprehensive understanding of existing markets and potential market segments – including travel values, trip planning behaviour, geographic origin, and participation patterns.
- Encourage businesses to reflect the brand and positioning in their promotions.
- Highlight the experiential themes in travel itineraries and story content that is prepared for the travel media.
- Continue to build the Clare County Council image bank with visual material that supports the themes.
  - Focus on developing a cross section of images that shows the immersive nature of the destination experience.
  - Encourage Tourism Ireland/Fáilte Ireland to expand the Content Pool in a similar manner.

**25. Promote our message smartly through maximising digital platforms – showcasing our iconic experiences while revealing unique bookable themed experiences that may not be expected.**

- Develop a single digital tourism platform with consolidated visitor-facing web pages and a fully integrated digital and social media strategy.
- Promote the story of Clare and create a sense of vibrancy in the travel ideas.
- Work with operators to develop links between the destination platform and bookable experiences and things to do or places to stay.
- Focus on developing compelling visual material with an emphasis on increasing video content and maximising social media channels.
- Continue to encourage user-generated content and develop a strategic approach to curating this content – recognising that it can have a much stronger impact on trip planning and purchasing behaviour than traditional marketing.
- Explore the use of new technologies to geo-fence the destination to target current visitors more effectively, to manage distribution through suggested trip ideas, and to gain a deeper understanding of the existing markets.
- Work with businesses and community marketing groups to establish mechanisms that will facilitate the development of a comprehensive and centralised events calendar. This can be achieved through an industry portal – see Strategy 26.
  - Establish criteria for the events listings to maintain its relevance to visitors.
  - Encourage businesses to establish a Trip Advisor account.

## 26. Support the strategic delivery of visitor information across Clare.

- Review the current delivery of visitor information and related visitor servicing.
  - Assess the current offering within the context of this Strategy.
  - Identify opportunities to enhance alignment, create efficiencies, and adopt alternative models of distribution.
- Explore the potential to re-open a visitor information kiosk at Shannon Airport, as this is a significant opportunity to orient a new visitor.

### INTERNAL COMMUNICATIONS WITH INDUSTRY

## 27. Develop regular communications programme with industry stakeholders that highlights key research, industry trends and marketing opportunities.

Good communications, networking and dialogue is essential to build a sense of cohesion and to improve uptake of programmes and services. A stakeholder model approach should be implemented, with the County Council tourism department playing the main role in establishing a comprehensive database and using it to regularly disseminate information to all stakeholders on matters relating to tourism. The process of building linkages should include new opportunities to network and to share good practices and progress in the implementation of this Strategy.

- Develop a comprehensive database of stakeholders using customer relations management software, and use the CRM programme to manage communications.
- Develop an industry portal on the tourism platform

and encourage businesses to register and keep their listings up to date. If core data is pulled from Trip Advisor, businesses will only need to enhance their listings as appropriate.

- Establish a regular programme of communications with monthly news updates to keep all stakeholders well informed.
  - Encourage businesses to submit news material.
  - Use the news programme to promote the activities of the Tourism Advisory Forum.
  - Ensure that the message of sustainability remains highly visible as a core foundational value.
  - Highlight progress of key partners such as Shannon Airport, to ensure that there is an ongoing awareness of success and growth.
- Communicate Strategy actions and outcomes on the basis of consistent action planning and monitoring.
- Consider hosting an annual tourism symposium. This event should be designed to:
  - Improve networking opportunities,
  - Share progress on the implementation of the Strategy,
  - Promote awareness on the workplan for the coming year,
  - Share and generate enthusiasm for the adoption of new best practices and innovation.

## 28. Develop a framework for performance measurement and communications of progress

This framework, as outlined in Section 5, will include identifying the performance indicators and the key performance indicators, developing necessary measurement tools, and the communications templates.

## 29. Continue to foster an understanding of risk and crisis management within industry, and develop a strategic approach to crisis management planning that will minimise effects and manage consequences of crises regardless of scale.

Covid-19 has been a shock to the entire tourism ecosystem and has underlined the need for crisis preparedness in a way that could barely be anticipated. Crises will continue to occur, whether these are natural phenomena, geo-political, or geo-economic crises, and all have the capacity to impact local tourism.

- Develop a tourism crisis and emergency plan that helps industry and communities to prepare for situations relating to natural occurrences. This plan needs to include preparedness, response and recovery measures, including a communications strategy that will assist in offsetting impact and enhance the safety of visitors and residents alike .
- Develop advisory services and response strategies for geo-political and geo-economic events that may only impact select markets and select business sectors.



# 5. Measuring Change

**Measuring change is essential to effective implementation of this Strategy. It underpins commitment to evidence-based decision-making and encourages an ongoing assessment of all the strategies and actions – providing a basis for corrective action. Measuring change will play a key role in communicating the story of Clare’s success in realising its 2030 vision and in achieving the 10-year strategic goals identified in this Strategy.**

Establishing a systematic approach to measuring change will assist Clare County Council and key stakeholders in developing a better understanding of how change is brought about and what influences this change. It will play a role in evaluating programmes and activities that are designed to promote the sustainable growth of tourism, and in determining overall impact.

While the concept of measuring change is widely accepted, the process of developing an appropriate framework for performance management is less well understood. There are inter-related components which work together in a chain-like manner to effect change, and metrics need to be in place to measure performance along the chain and to gain better insight on causal linkages.

Understanding what can and what needs to be measured is the starting point in development a framework. As cause-effect linkages become apparent, the scale and scope of resources required to achieve the goals outlined in this Strategy can be shaped and re-shaped to deliver the intended outcomes and longer-term impact.

The figure below shows the relationship between inputs, activities, and outputs, and how these shape the outcomes and overall impact of the Strategy.



## ESTABLISHING A FRAMEWORK FOR MEASUREMENT

Intended outcomes and how they contribute to the desired impact or overall goals of this Strategy should be the primary focus.

There are a range of metrics that can be used to major measure inputs, activities and outputs, and these can be identified for each strategic priority. A number of potential metrics for these priorities are outlined in the section on implementation. While it is important to track specific metrics relating to inputs, activities and outputs, they may not reflect or measure the effectiveness of overall implementation in terms of achieving outcomes and the underlying goals of the Strategy.

It needs to be understood by all stakeholders that inputs, activities and outputs are essentially measures of execution, while outcomes and the overall 10-year impact is the measure of change that this Strategy is seeking to achieve.

In establishing the assessment framework, consideration needs to be given to data sources, frequency and collection procedures. There should be an appropriate balance between efficiency in the data collection and reporting process and effectiveness in portraying change that matters to stakeholders.

The framework should include both metrics of inputs, activities and outputs that gauge performance or progress in implementation, together with Key Performance Indicators (KPIs) that are designed to measure outcomes and are closely aligned with the Strategy goals. The KPIs will assist in tracking the achievement of the goals, while the other metrics will highlight what is being done to support the accomplishment of the KPIs.

Reporting and communicating performance management will take different formats.

- Internal reporting by key stakeholders, particularly Clare County Council to assess progress and to shape shorter-term action planning.
- External reporting of key indicators and measures to report on the progress of Strategy implementation.

Reporting needs to take exogeneous variables into consideration. External forces can have a significant impact on outcomes.

The unprecedented collapse of the industry globally as a result of Covid-19 is the most dramatic illustration of how external influences can impact outcomes in an unimaginable way. Other factors that have and will continue to come into play include global economic cycles, exchange rates, Brexit and geo-politics.

Steps to be taken:

- Identify potential performance indicators that will track the progress of implementing the activities relating to the strategic priorities.
- Identify data sources for each indicator. This can include the collection of primary data, and can be both quantitative and qualitative.
- Identify the Key Performance Indicators that can evaluate progress in achieving the goals of the Strategy. In certain cases it may be necessary to develop new tools to measure the KPIs.
- Establish shorter-term targets that reflect shorter-term action plans.
- Consider developing a visual indicator dashboard that can be used to communicate results to industry.

## KEY PERFORMANCE INDICATORS

GOALS	VALUE OF TOURISM / SUSTAINABILITY SCORECARD – KPIs based on:
Work collaboratively	<ul style="list-style-type: none"> <li>• International market share of visitors and expenditures / spend per visitor</li> <li>• Domestic market share of visitors and expenditures / spend per visitor</li> <li>• Occupancy / RevPAR / Average Daily Room Rate</li> <li>• Tourism employment</li> <li>• Industry sentiment index</li> <li>• Resident sentiment index</li> <li>• Visitor satisfaction index and Net Promoter Score</li> <li>• Sustainability metrics</li> <li>• Community value of tourism metrics</li> </ul>
Deliver compelling experiences	
Global sustainable destination	
Create a smart destination	
Gateway of the west	
Spread the benefits	

## 6. Implementation

Realising the vision that underlies this Strategy requires a multi-faceted approach to implementation. While Clare County Council is steward of this Strategy and will play a lead enabling role in pursuing the strategic directions, successful implementation is a shared responsibility and achieving the goals is highly dependent on a cohesive team effort. It is a ten-year Strategy, and to be effective and remain relevant throughout this period of time, its implementation will need to be facilitated through shorter-term action planning and regular monitoring. This will provide opportunity to continually reassess priorities, set targets, and ensure a unified approach to developing Clare as a sustainable destination and tourism as a cornerstone of the economy, while maintaining the well-being of local communities and the integrity of the environment.

### STRENGTHEN LEADERSHIP AND COLLABORATION

STRATEGIC PRIORITIES	WHO IS INVOLVED	TIMING	PERFORMANCE INDICATORS
<p><b>ACTION PLANNING</b></p> <p>Effective implementation of a ten-year strategy requires a series of shorter-term action plans. <b>Develop the first action plan</b> mapping out a Covid-19 recovery plan and the actions that need to be initiated in relation to each of the 29 strategic priorities and in response to the new 2020 realities.</p>	Clare County Council	Immediate	<ul style="list-style-type: none"> <li>Completion of initial Destination Recovery and Strategy Action Plan</li> </ul>
<p><b>1. Establish a county-wide Tourism Advisory Forum to strengthen governance and act as an advisory group for Clare County Council and a spokes-group for tourism.</b></p> <ul style="list-style-type: none"> <li>Develop terms of reference and appoint initial chairperson from industry</li> </ul>	Clare County Council Community tourism groups Industry	Immediate	<ul style="list-style-type: none"> <li>Functioning county-wide Tourism Advisory Forum</li> <li>Formalised county-wide commitment to the principles of sustainability in place <b>(KPI)</b></li> <li>Participation in new engagement practices</li> <li>Relevant awards and certification <b>(KPI)</b></li> <li>Identification of sustainability metrics</li> <li>Internal council tourism resources</li> <li>Cross-departmental dialogue mechanisms in place</li> <li>Industry sentiment index <b>(KPI)</b></li> <li>Resident sentiment index <b>(KPI)</b></li> </ul>
<p><b>2. Work towards positioning Clare as a destination to be recognised nationally and internationally for its commitment to responsible tourism and sustainability.</b></p> <ul style="list-style-type: none"> <li>Establish a formalised county-wide commitment to sustainability</li> <li>Explore opportunities for global recognition as a sustainable destination</li> </ul>	Clare County Council Community tourism groups Businesses	Medium-term but with an ongoing emphasis on sustainability	
<p><b>3. Develop new and strengthen existing approaches to generating integrated and cross-sectoral partnerships in tourism locally and regionally.</b></p> <ul style="list-style-type: none"> <li>Continue to support and strengthen the Global Geopark as a model</li> </ul>	Clare County Council Global Geopark Local stakeholders	Short to Medium term	
<p><b>4. Continue to strengthen and support Clare County Council in its internal resources and capacity to develop and promote tourism.</b></p> <ul style="list-style-type: none"> <li>Reassess internal county council resources in relation to tourism</li> <li>Develop structured mechanisms for cross-departmental dialogue on tourism within Clare County Council</li> </ul>	Clare County Council – all departments	Short term	

## IMPROVE CONNECTIVITY

STRATEGIC PRIORITIES	WHO IS INVOLVED	TIMING	PERFORMANCE INDICATORS
<p><b>5. Work collaboratively with Shannon Airport to secure and sustain new routes that will improve air connectivity to the west of Ireland and increase air arrivals.</b></p> <ul style="list-style-type: none"> <li>Establish the Airport partnership alliance</li> <li>Advocate for Shannon Airport to be a key element of Ireland’s aviation policy</li> <li>Work collaboratively on marketing, route development initiatives and Clare-centric packages to establish role as gateway to the west</li> </ul>	Shannon Group Clare County Council Limerick City and County Council Galway County Council Chambers of Commerce Key business partners	Short-term and ongoing	<ul style="list-style-type: none"> <li>Annual % growth in passenger traffic through Shannon Airport <b>(KPI)</b></li> <li>Market share of all overseas air passenger traffic <b>(KPI)</b></li> <li>Visitor satisfaction index <b>(KPI)</b></li> <li>Community sentiment index <b>(KPI)</b></li> <li>Growth in direct air access to markets</li> <li>Functioning public transportation working group</li> <li>Transportation audit completed</li> <li>Identification, implementation and assessment of pilot transportation initiatives</li> <li>Annual transit trips per capita</li> <li>Specific traffic management solutions in place</li> </ul>
<p><b>6. Explore the feasibility of attracting an appropriate segment of the cruise sector in a sustainable manner.</b></p> <ul style="list-style-type: none"> <li>Undertake a comprehensive evaluation of the proposal within the context of sustainability</li> </ul>	Clare County Council Community tourism groups	Short-term	
<p><b>7. Develop and implement a public transportation strategy that addresses sustainable travel options designed to support tourism – focusing on enhancing connectivity between local destinations and providing visitors with viable mobility options.</b></p> <ul style="list-style-type: none"> <li>Prepare an audit of all existing services</li> <li>Establish a working group to identify working practices and determine potential new solutions</li> <li>Assess demand management opportunities to help optimise pilot initiatives</li> <li>Implement existing strategies on traffic management and public transport</li> <li>Assess current transportation in relation to personal accessibility</li> </ul>	Clare County Council National and local transportation partners Academic partners Community tourism groups	Commence short-term – and complete in phases on an on-going basis	
<p><b>8. Continue to work with local stakeholders to identify and address key traffic management concerns within north-west Clare (primarily the Geopark area).</b></p> <ul style="list-style-type: none"> <li>Develop and implement an Integrated Traffic and Transport Strategy for the Burren and Cliffs of Moher</li> <li>Continue to explore ways of addressing traffic management issues associated with car parking pinch points, local parking needs</li> <li>Work with communities in developing a stronger hub and spoke model, with Ennis serving as the primary hub</li> </ul>	Clare County Council National Transport Authority National Roads Authority NPWS Community tourism groups	Ongoing	

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## IMPROVE CONNECTIVITY

STRATEGIC PRIORITIES	WHO IS INVOLVED	TIMING	PERFORMANCE INDICATORS
<p><b>9. Work with the Department of Transport, Tourism and Sport to promote timely completion of major transportation infrastructure projects and ancillary initiatives that have the capacity to strengthen tourism.</b></p> <ul style="list-style-type: none"> <li>• Completion of specific projects</li> <li>• County-wide audit of brown tourism signage</li> </ul>	Clare County Council National Roads Authority Dept. of Transport, Tourism and Sport	Short-term and ongoing	CONTINUED <ul style="list-style-type: none"> <li>• Completion of public infrastructure projects</li> <li>• Increased uptake of digital technologies in destination management</li> <li>• Increased tourism SME uptake in IT training</li> <li>• Implementation of best practices in accessibility</li> </ul>
<p><b>10. Work with partners at all levels to strengthen infrastructure and services that will enhance digital connectivity across the county.</b></p> <ul style="list-style-type: none"> <li>• Continue to implement the Clare Digital Strategy</li> <li>• Work with the County Council Broadband, Digital and IT Department to explore the transferability of ‘smart city’ technological advancements</li> <li>• Promote training in application of digital technologies to rural tourism SMEs</li> </ul>	Clare County Council Local Enterprise Offices	Ongoing	
<p><b>11. Raise awareness and support for initiatives that will assist in creating a more accessible and inclusive destination.</b></p> <ul style="list-style-type: none"> <li>• Continue to implement the <i>Clare Age Friendly Strategy 2018 – 2022</i></li> <li>• Promote the ongoing development of accessible tourism products</li> </ul>	Clare County Council Access Ireland	Short-term and ongoing	

## BUILD VIBRANT EXPERIENCES

STRATEGIC PRIORITIES	WHO IS INVOLVED	TIMING	PERFORMANCE INDICATORS
<p>INTEGRATED PLANNING</p> <p><b>12. Build a strong understanding of the positioning narrative and use this narrative as the framework for experience development.</b></p> <ul style="list-style-type: none"> <li>• Work with a creative agency to continue refining the narrative with the intent of refreshing the Clare brand</li> <li>• Ensure that industry is familiar with the positioning narrative</li> </ul>	Clare County Council	Short-term	<ul style="list-style-type: none"> <li>• Value of tourism index <b>(KPI)</b></li> <li>• Market share of domestic and international trips <b>(KPI)</b></li> <li>• Market share of domestic and international expenditures <b>(KPI)</b></li> <li>• Industry sentiment index <b>(KPI)</b></li> <li>• Community sentiment index <b>(KPI)</b></li> <li>• Visitor satisfaction index <b>(KPI)</b></li> <li>• Net Promoter Score <b>(KPI)</b></li> <li>• Tools to promote the positioning narrative</li> </ul>
<p><b>13. Collaborate with Fáilte Ireland and the communities to advance the work that has already commenced on planning for visitor experience development.</b></p> <ul style="list-style-type: none"> <li>• Complete the Wild Atlantic Way visitor experience development planning process in Clare and promote a collaborative approach to implementation</li> <li>• Consolidate the planning work that has been undertaken for Lough Derg</li> </ul>	Fáilte Ireland Clare County Council Community tourism groups Tourism industry	Short-term and ongoing	

## BUILD VIBRANT EXPERIENCES

STRATEGIC PRIORITIES	WHO IS INVOLVED	TIMING	PERFORMANCE INDICATORS
<p><b>14. Build the concept of sustainability firmly into ongoing planning processes for tourism and outdoor recreation.</b></p> <ul style="list-style-type: none"> <li>• Work towards adopting an ecosystem-based approach that assesses capacity of landscapes, communities, and natural resources</li> <li>• Implement a planning model based on cumulative effects assessment</li> <li>• Reassess visitor management policies for high-use sites and areas with related issues, and determine access policies for areas that are expressing concern over potential growth of coach traffic.</li> </ul>	Clare County Council Community tourism groups Environmental interest groups Local land owners	Ongoing	CONTINUED <ul style="list-style-type: none"> <li>• Number of adopted tourism related plans that give appropriate consideration to sustainability best practices in the planning methodology</li> <li>• Number of new tourism business starts/failures</li> <li>• Tourism employment</li> <li>• Value of events tourism</li> <li>• Length of season / occupancy rates for accommodation sector</li> <li>• Length of stay</li> <li>• Relevant strategic environmental assessment indicators as measured by Clare County Council</li> <li>• Functioning county-wide trails steering group</li> <li>• Completion of Greenway Masterplan</li> <li>• Development of the West Clare Rail Greenway</li> <li>• Completion of county recreation trails strategy</li> <li>• Kilometres of new trails / greenways / bike lanes</li> </ul>
<p>TRAILS DEVELOPMENT</p> <p><b>15. Prioritise the development of the West Clare Rail Greenway.</b></p> <ul style="list-style-type: none"> <li>• Work with the Irish Farmers Association to establish agreed practice for planning and developing the Greenway.</li> <li>• Move forward with the initial Kilrush to Kilkee pilot project</li> <li>• Develop a communications strategy</li> <li>• Develop a comprehensive masterplan for the entire route</li> </ul>	Clare County Council Irish Farmers Association Local land owners Local tourism groups Local communities	Initiate pilot project short-term  Completion likely to be long-term	
<p><b>16. Develop a coordinated approach to the ongoing development and maintenance of the various trail network systems across Clare, including the four National Waymarked Trails.</b></p> <ul style="list-style-type: none"> <li>• Consolidate strategic oversight through establishing a trails steering group</li> <li>• Consider extending the geographic role of the CLDC Rural Recreation Officer to assist in consolidating trails development across the county</li> <li>• Prepare a county strategy on recreation trails development</li> <li>• Identify a classification of trails and appropriate usage for all trails</li> <li>• Highlight key opportunities to extend trails and/or develop connectivity between existing trails systems, and continue to examine the potential of proposed trail initiatives such as the Shannon Greenway.</li> </ul>	Clare County Council Clare Local Development Company Leave No Trace Ireland Community trail groups Trail user groups Community tourism groups Irish Farmers Association Local land owners	Short-term and ongoing	

## BUILD VIBRANT EXPERIENCES

STRATEGIC PRIORITIES	WHO IS INVOLVED	TIMING	PERFORMANCE INDICATORS
<p>THEMATIC EXPERIENCE DEVELOPMENT</p> <p><b>17. Work collaboratively to support the development of theme-based experiences that align with the positioning narrative.</b></p> <p><b>Experience our HOLISTIC LANDSCAPES</b></p> <p>a) Continue to elevate the international significance of the Burren and Cliffs of Moher UNESCO Global Geopark as a designated area renowned for distinctive geotourism experiences</p> <p>b) Integrate the theme of geotourism across Clare, and use ecotourism to expand the offering</p> <p>c) Strengthen the profile of wellness as a sector and well-being/vibrancy as the underlying promise to visitors that are looking to Discover Clare</p>	<p>Clare County Council Fáilte Ireland Global Geopark / Cliffs of Moher Burren Ecotourism Network National Parks and Wildlife Service Community Tourism Groups Gaelic Athletic Association</p>	<p>Ongoing</p>	<p>CONTINUED</p> <ul style="list-style-type: none"> <li>• Annual number of new/improved market ready experiences</li> <li>• Global/national recognition of distinctive tourism assets, landscapes and intangible cultural heritage</li> <li>• €s invested and completion of proposed public and private sector attraction products/projects</li> </ul>
<p><b>Explore our HIGH TOWERS AND HIGH POWERS</b></p> <p>d) Work with emerging initiatives that are focused on bringing together medieval and pilgrimage routes to tell a joined-up story</p> <p>e) Implement existing plans and associated initiatives to raise the profile of iconic and supporting sites (such as the <i>Inis Cealtra Visitor Management and Sustainable Tourism Development Plan</i> and the <i>Bunratty Masterplan</i>)</p> <p>f) Undertake feasibility research and development work to strengthen the theme of High Towers and High Powers at other key sites and locations</p>	<p>Clare County Council Fáilte Ireland Office of Public Works Shannon Heritage Community tourism groups</p>	<p>Ongoing</p>	
<p><b>Pursue our ADVENTURE AND FAMILY FUN</b></p> <p>g) Focus on developing a strong spectrum of fresh water-based recreation experiences on Lough Derg, highlighting the Lower Lough Derg as a signature destination within Ireland’s Hidden Heartlands area</p> <p>h) Strengthen marine-based recreation through working with communities and activity sectors on projects designed to enhance the role of this sector locally and regionally</p>	<p>Clare County Council Fáilte Ireland Waterways Ireland Lough Derg Marketing Group Communities</p>	<p>Ongoing</p>	

## BUILD VIBRANT EXPERIENCES

STRATEGIC PRIORITIES	WHO IS INVOLVED	TIMING	PERFORMANCE INDICATORS
<p>THEMATIC EXPERIENCE DEVELOPMENT</p> <p><b>Pursue our ADVENTURE AND FAMILY FUN</b> continued</p> <p>i) Continue to build a cycle-culture in Clare through working with local biking groups to raise the profile of different forms of biking and expand activity opportunities</p> <p>j) Re-establish Clare as an angling destination through a multi-faceted approach to improve access to good angling opportunities</p> <p>k) Continue to work collaboratively to leverage Clare’s world-class golf resorts and courses</p> <p>l) Continue to work in partnership with special interest groups to attract sports events that will support Clare’s positioning as a destination for adventure and will highlight its range of land and water-based outdoor activities</p>	<p>Clare County Council Fáilte Ireland Coillte Local biking and cycle groups Inland Fisheries Ireland Business operators</p>	<p>Ongoing</p>	<ul style="list-style-type: none"> <li>• Annual number of new/improved market ready experiences</li> <li>• €s invested and completion of proposed public and private sector attraction products/projects</li> </ul>
<p><b>Celebrate our CREATIVE VITALITY</b></p> <p>m) Promote the ongoing development of Clare as the county of traditional music through supporting events and experiences that highlight this aspect of Clare’s culture</p> <p>n) Work with communities across the county to support and develop existing and new festivals and events that highlight this creative vitality and <i>joie de vivre</i></p> <p>o) Support the ongoing development of arts and crafts</p> <p>p) Highlight and capitalise on the county’s ‘heritage’ sports and stories of sporting significance</p> <p>q) Work with food and drink producers and the culinary/hospitality sector to build food and local flavours as a key attractor in Clare</p> <p>r) Celebrate the county’s innovative industrial heritage and its current areas of excellence in other economic sectors</p> <p>s) Work towards developing craftsman experiences that focus on skills development in conservation and traditional building</p>	<p>Clare County Council Ennis Chamber of Commerce Event organisers/committees Gaelic Athletic Association Food producers Electricity Supply Board University of Limerick The Heritage Council</p>	<p>Ongoing</p>	

## ENHANCE SUPPORTING INFRASTRUCTURE AND KNOWLEDGE

STRATEGIC PRIORITIES	WHO IS INVOLVED	TIMING	PERFORMANCE INDICATORS
<p>SUPPORTING INFRASTRUCTURE</p> <p><b>18. Undertake a comprehensive assessment of hotel and visitor accommodation and develop an accommodation strategy to support the growth of overnight visitation.</b></p> <ul style="list-style-type: none"> <li>Undertake a comprehensive assessment of all accommodation elements across the county, including the camping sector</li> <li>Expand the existing Clare County Accommodation Investment Strategy Toolkit and ensure that it addresses the gaps and deficiencies</li> </ul>	<p>Clare County Council Fáilte Ireland Accommodation sector</p>	<p>Short-term</p>	<ul style="list-style-type: none"> <li>Value of tourism index <b>(KPI)</b></li> <li>Market share of domestic and international trips <b>(KPI)</b></li> <li>Market share of domestic and international expenditures <b>(KPI)</b></li> <li>Community sentiment index <b>(KPI)</b></li> <li>Visitor satisfaction index <b>(KPI)</b></li> <li>Net Promoter Score <b>(KPI)</b></li> </ul>
<p><b>19. Develop the profile, experiences and infrastructure of Ennis as a core hub attraction and gateway to the county.</b></p> <ul style="list-style-type: none"> <li>Assess all aspects of accommodation and related hospitality services in Ennis, including conference venues with state-of-the-art facilities, and work towards improving and expanding the facilities</li> <li>Strengthen the development of Ennis as a core hub through the implementation of <i>Ennis 2040</i>, and the town's orientation/gateway role through appropriate support services</li> <li>Support the implementation of <i>Ennis Niche Destination Town</i></li> <li>Develop a marketing plan for the town</li> </ul>	<p>Clare County Council Ennis Chamber of Commerce / Promote Ennis Ennis business community</p>	<p>Ongoing</p>	<ul style="list-style-type: none"> <li>Completion of accommodation audit and assessment</li> <li>€s invested in accommodation</li> <li>Percent of 4-star and 5-star registered rooms</li> <li>Occupancy rate</li> <li>RevPAR and average daily room rate (ADRR)</li> <li>Uptake in incentivised accommodation support programmes</li> <li>€s invested in supporting infrastructure / public realm</li> </ul>
<p><b>20. Work with community partners to strengthen the role of towns and villages elsewhere as destination hubs, through identifying infrastructural issues that constrain tourism and encouraging an ongoing improvement of infrastructure and enhancement of the public realm.</b></p> <ul style="list-style-type: none"> <li>Focus on communities that have the potential to act as gateways to key visitor attractions, such as Corofin, and implement existing plans for towns and villages such as Shannon and Doolin</li> <li>Continue to assess and address deficiencies in public infrastructure designed to support the visitor experience</li> <li>Maintain efforts towards protecting the visual character of communities</li> <li>Work with Irish Water to address issues relating to water and wastewater facilities in smaller rural hub communities</li> </ul>	<p>Clare County Council Community tourism groups Chambers of Commerce NPWS Irish Water Department of Housing, Planning &amp; Local Government</p>	<p>Ongoing</p>	

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## ENHANCE SUPPORTING INFRASTRUCTURE AND KNOWLEDGE

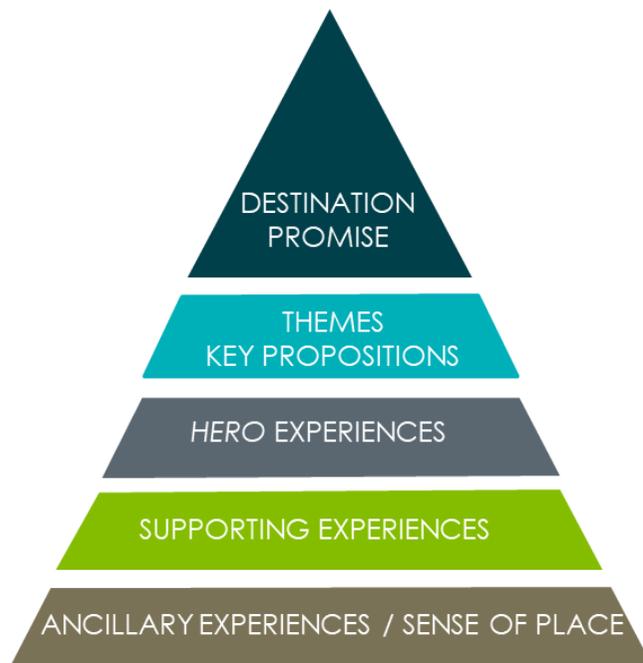
STRATEGIC PRIORITIES	WHO IS INVOLVED	TIMING	PERFORMANCE INDICATORS
<p>KNOWLEDGE AND CAPACITY</p> <p><b>21. Work with Fáilte Ireland and related partners to deliver a bespoke business support programme that will enhance the capacity of industry to develop, deliver and market saleable experiences.</b></p> <ul style="list-style-type: none"> <li>Expand the business support programme that is being developed for businesses on the Wild Atlantic Way to be inclusive of the entire county</li> <li>Encourage businesses to engage in Fáilte Ireland’s accredited suite of Operational Excellence programmes</li> <li>Leverage the existing work that is taking place relating to the creation of rural enterprise hubs, and use these hubs to offer incubator services</li> </ul>	<p>Clare County Council Fáilte Ireland Tourism businesses Clare Local Development Company</p>	<p>Ongoing</p>	<p>CONTINUED</p> <ul style="list-style-type: none"> <li>Participation in business support programmes</li> <li>Destination and SME certification in Fáilte Ireland’s Operational Excellence programmes</li> <li>Database – stories and relevant local information</li> </ul>
<p><b>22. Support the development of the positioning themes through curating stories and working with relevant partners to advance local knowledge.</b></p> <ul style="list-style-type: none"> <li>Encourage the development of local initiatives that will assist in the collection and curation of stories</li> <li>Review the assessment work on landscape character and seascapes that was completed in 2004 and identify ways of utilising this material</li> </ul>	<p>Clare County Council Local historical societies Community organisations</p>	<p>Ongoing</p>	
<p><b>23. Explore opportunities to network with new partners, including non traditional partners and academic institutions, to engage in knowledge sharing and the identification of innovative thinking.</b></p> <ul style="list-style-type: none"> <li>Establish regular dialogue with neighbouring county council tourism representatives and relevant stakeholders to identify partnership opportunities</li> <li>Establish a mechanism to encourage dialogue between universities/ academic institutions with an interest in tourism, and with non-traditional partners to advance the concept of a smart destination</li> <li>Continue to establish strategic partnerships with specific Global Geoparks</li> <li>Become a member of the Network of European Regions for a Sustainable and Competitive Tourism</li> </ul>	<p>Clare County Council Neighbouring county councils Academic partners Technology partners</p>	<p>Ongoing</p>	

## CREATE AWARENESS

STRATEGIC PRIORITIES	WHO IS INVOLVED	TIMING	PERFORMANCE INDICATORS	
MARKETING COMMUNICATIONS - EXTERNAL				
<p><b>24. Refresh the destination brand and adopt a thematic approach to marketing and communications that promotes the key themes, highlights sustainability as a core value of Clare as a destination, and is aligned with the regional propositions – Ireland’s Wild Atlantic Way and Ireland’s Hidden Heartlands.</b></p> <ul style="list-style-type: none"> <li>Refresh the existing brand to highlight the promise of <i>feel vibrant</i> and develop a marketing plan that supports the positioning</li> </ul>	Clare County Council Fáilte Ireland	Short-term	<ul style="list-style-type: none"> <li>Value of tourism index <b>(KPI)</b></li> <li>Market share of domestic and international trips <b>(KPI)</b></li> <li>Market share of domestic and international expenditures <b>(KPI)</b></li> <li>Industry sentiment index <b>(KPI)</b></li> <li>Community sentiment index <b>(KPI)</b></li> <li>Visitor satisfaction index <b>(KPI)</b></li> <li>Net Promoter Score <b>(KPI)</b></li> <li>Refreshed brand</li> <li>Current marketing plan</li> <li>Number of new visual assets</li> <li>Fully consolidated visitor-facing website reflecting new positioning</li> <li>Comprehensive and current county-wide events calendar</li> <li>Comprehensive CRM database</li> <li>Industry portal</li> <li>Monthly communications with industry</li> <li>Annual tourism symposium</li> <li>Measurement framework in place</li> <li>Current crisis management plan</li> </ul>	
<p><b>25. Promote our message smartly through maximising digital platforms – showcasing our iconic experiences while revealing unique bookable themed experiences that may not be expected.</b></p> <ul style="list-style-type: none"> <li>Develop a single digital tourism platform with consolidated visitor-facing web pages and a fully integrated digital and social media strategy</li> <li>Develop compelling visual assets and user-generated content</li> </ul>	Clare County Council Community tourism groups	Short-term and ongoing		
<p><b>26. Support the strategic delivery of visitor information across Clare.</b></p> <ul style="list-style-type: none"> <li>Identify opportunities to enhance alignment, create efficiencies, and adopt alternative models of distribution</li> </ul>	Clare County Council Community tourism groups	Ongoing		
INTERNAL COMMUNICATIONS WITH INDUSTRY				
<p><b>27. Develop regular communications programme with industry stakeholders that highlights key research, industry trends and marketing opportunities.</b></p> <ul style="list-style-type: none"> <li>Develop an industry portal and establish regular communications</li> </ul>	Clare County Council	Short-term and ongoing		
<p><b>28. Develop a framework for performance measurement and communications of progress</b></p> <ul style="list-style-type: none"> <li>Identify indicators, data sources, and develop relevant measurement tools</li> </ul>	Clare County Council	Ongoing		
<p><b>29. Continue to foster an understanding of risk and crisis management within industry, and develop a strategic approach to crisis management planning that will minimise effect and manage consequences regardless of scale.</b></p> <ul style="list-style-type: none"> <li>Develop a tourism crisis and emergency plan that helps industry and communities prepare for a range of crisis situations</li> </ul>	Clare County Council	Short-term		

# Appendix

The following is an extract from a Wild Atlantic Way Visitor Experience Development Plan. It provides an overview of experience development and defines the concept of HERO Experiences within the experience pyramid.



**Experience Development** is the art and science of delivering a consistent message that inspires consumers throughout their travel experience – providing something that not only motivates visitors to become ambassadors for your destination, but also gives them the tools to help tell your message.

The concept of experience development extends beyond just simply providing an enjoyable experience for visitors. To achieve international cut-through in today's 'sharing economy', experiences need to utilise thematic interpretation techniques that evoke a positive emotional response in visitors, making them want to brag about their experience with family and friends and to experience it again and again. By embedding an experience with the unique selling features, or 'signatures', of a destination, visitors will associate that experience specifically with the destination and become advocates for these experiences with others.

**DESTINATION PROMISE:** The expectation that is created amongst potential visitors about the experience(s) that they will enjoy in the destination (i.e. a promise of what they will receive based on what is being delivered)

**THEMES / KEY PROPOSITIONS:** The key underlying themes that set this destination apart and makes it distinctive – the stories that your customers can connect with that showcase your key proposition

**HERO EXPERIENCES:** The experiences that are your signature – best delivered in County Clare

**SUPPORTING EXPERIENCES:** What each business does to bring the HERO experience to life – the products that allows the customer to access the wider experience

**ANCILLARY EXPERIENCE MIX:** How the wider tourism offering and sense of place/ public realm supports the destination promise

Included with permission from Fáilte Ireland

## CONSULTATION

The consultation process involved an extensive series of workshops, community clinics, steering group meetings, presentation meetings and feedback presentations and discussions.

In addition, a large number of stakeholders were interviewed either on site, in community, or on the telephone, with a number contributing through e-mail submissions.

### INTRODUCTORY OVERVIEW TO INDUSTRY

- Tourism Networking Event: The Inn at Dromoland, Ennis – February 2019

### INPUT CONSULTATION WORKSHOPS 2019

- Falls Hotel, Ennistymon – March
- Oakwood Arms Hotel, Shannon – March
- Templegate Hotel, Ennis (two sessions) – March
- Lakeside Hotel, Killaloe – March
- Vandeleur Walled Garden, Kilrush – March
- Falls Hotel, Ennistymon – June
- Lakeside Hotel, Killaloe – June
- Kilkee Bay Hotel, Kilkee – June
- Templegate Hotel, Ennis – June
- Evening drop-in clinics were held in each of the four venues in June

### FINAL PUBLIC CONSULTATION

- Templegate Hotel, Ennis (two sessions) – February 2020

### PRESENTATIONS TO COUNCIL

- June 2019
- July 2020

### STEERING GROUP MEETINGS

- December 2018;
- February, June, October, November 2019
- February, June 2020

### POST-DRAFT FEEDBACK DISCUSSIONS

- Clare Tourism Steering Group
- Clare County Council Management Team
- Clare County Council Senior Team
- Elected Members of Clare County Council
- Rural Development Strategy Policy Committee

