

LIMERICK TOURISM DEVELOPMENT AND MARKETING STRATEGY

2017-2023

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***Limerick Tourism Development
and Marketing Strategy
2017-2023***

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Executive Summary

The Limerick Tourism Development and Marketing Strategy 2017-2023 has been designed to revitalise the tourism sector in Limerick, capture key opportunities to grow the sector and highlight priority action areas to unlock the significant benefits that a thriving tourism industry can bring.

This Tourism Development and Marketing Strategy comes at a time of great optimism and significant transformation in Limerick. This is evident in the drive and ambition of the many organisations working within the tourism sphere across the entire area. It follows on from the success of Limerick's reign as the European City of Sport 2011 and the National City of Culture in 2014, and the potential of plans such as Limerick 2030: Economic and Spatial Plan for Limerick to transform the City of Limerick into one of Europe's greatest and to develop major transformational sites across the City and County. Recent investments in the tourism sector including the €172 million investment in Adare Manor and Golf Course and the €10 million investment in the Engage Rugby Experience museum have added to the sense of energy and excitement around Limerick's tourism industry. These achievements and other accolades such as Limerick's Purple Flag status have fostered a renewed energy and sense of pride in Limerick people throughout the county. This strategy is Limerick's response to the huge appetite that exists for driving forward tourism in the city and county, and for ensuring that Limerick is recognised as a must visit destination for both domestic and international visitors. Delivering on the

overarching vision and key objectives, will require clear direction, commitment and determination to ensure that Limerick can rival the success of international destinations in the tourism sector.

Limerick has so much to offer as a tourism destination. The forests and mountains, rivers and lakes of rural Limerick provide a tranquil setting for the many nature based activities on offer such as mountain biking, walking, boating, and fishing. Music and drama, arts and creativity abound throughout Limerick as showcased in the diversity of events and festivals that take place across the vibrant City, and in the County's many towns and villages. Limerick also shines as a sporting centre with world class facilities and an infectious enthusiasm for all things rugby and GAA. Physical remnants of the past are everywhere. These range from the prehistoric stone circle at Grange on the shores of Lough Gur, to the medieval strongholds of King's Island, Kilmallock and Askeaton, to the architectural heritage of Georgian Limerick City, and the maritime heritage of the Shannon River and estuary. Aside from the natural and physical assets that make Limerick a great place to visit, there is an authenticity to the place that is most evident in the personality

of its people and their approach to life. Limerick also benefits from a highly strategic location with Shannon Airport on its doorstep, excellent road and rail links to the wider region, and its position as a pivot point between the Wild Atlantic Way (and indeed will form part of the forthcoming Wild Atlantic Way Zone), Ireland's Ancient East, and the Shannon/Lakelands areas.

As a collective, these are the things – place, personality and position, which the tourism strategy must capitalise on. To do this, a place centred strategy that unites city and county in driving the tourism agenda forward is required. The **Limerick Tourism Development and Marketing Strategy 2017-2023** sets out an ambitious case for tourism and strengthens the proposition that exists in the priority areas of waterways, activities, heritage, arts and culture, by focusing not only on the key attractions that comprise these tourism areas, but also by enhancing the wider setting in which they are located. With this place centred approach to tourism, it is envisaged....

'... that Limerick will be internationally recognised as a world class location to visit'.

1.1 million visitors,

generating €360.6 million in revenue and creating in the region of 1,500 new jobs

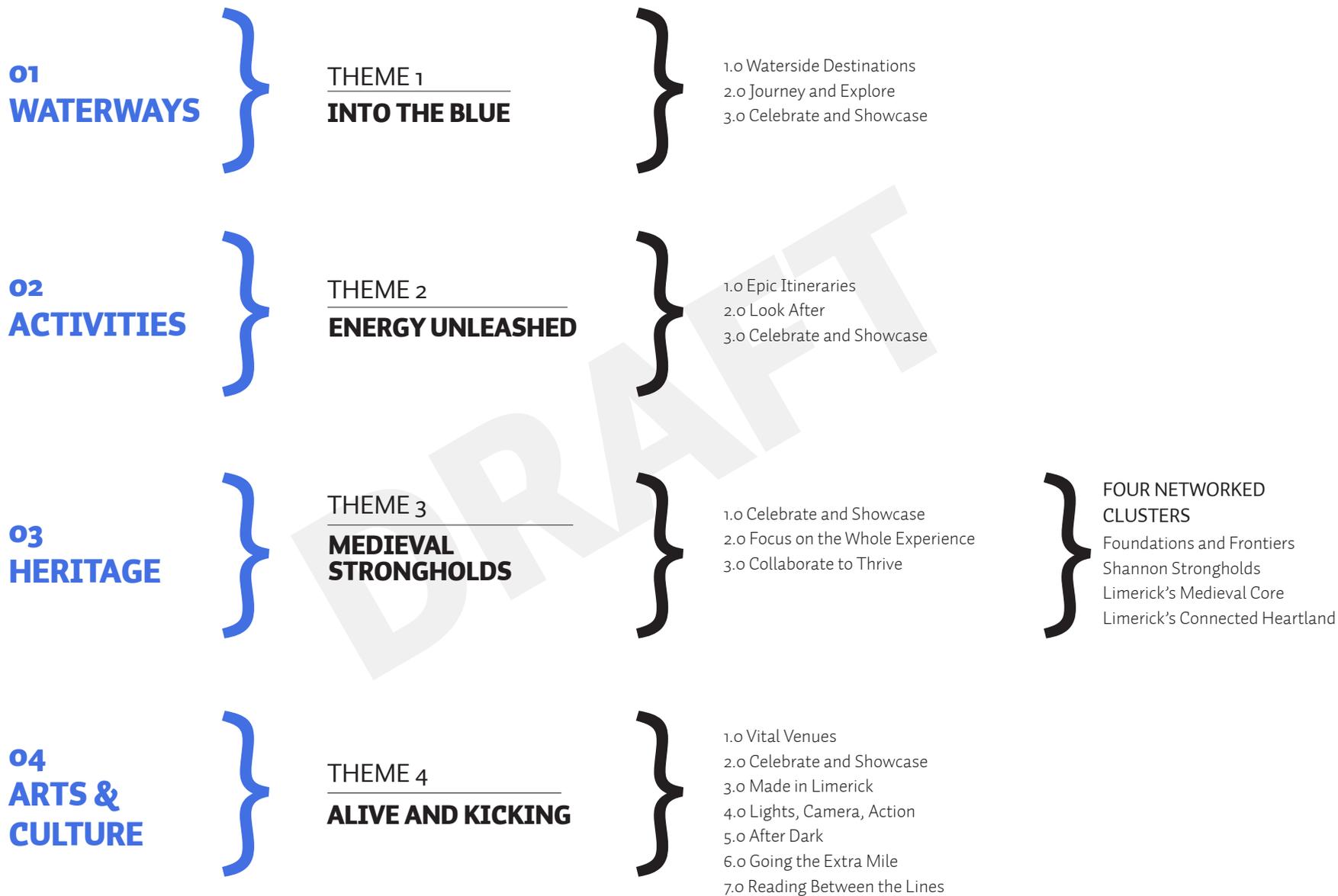
The delivery of this vision will be achieved through the implementation of a series of actions formed around four key themes which are designed to optimise the potential of the waterways (**Into the Blue**), activities (**Energy Unleashed**), heritage (**Medieval Strongholds**), arts and culture (**Alive and Kicking**). With a sustained commitment to successfully deliver the thematic action programmes and to set in place the recommended management structures to support its delivery, it is envisaged that by 2023 total number of visitors to Limerick City and County will reach **1.1 million, generating €360.6 million in revenue and creating in the region of 1,500 new jobs** in the tourism sector.

A comprehensive review of the existing tourism base in Limerick, and an extensive consultation process were central to informing the themes and associated actions set out in this strategy (as visualised in summary form below). Management structures, a roadmap for delivery and a monitoring framework to ensure the successful delivery of the thematic actions are also set out.



4 KEY DRIVERS

DRAFT



1.0 Introduction

1.1 PURPOSE OF THIS STUDY

Tourism is a critical pillar of the Irish economy generating over €8.3 billion in total revenue in 2016. The sector supports in the region of 205,000 jobs, and with the success of experience propositions such as the Wild Atlantic Way (WAW) and more recently, Ireland's Ancient East, the strong growth experienced in recent years, is expected to continue. On a county level, overseas and domestic tourism to Limerick generated an annual revenue of over €244 million with close to 800,000 visitors to the county in the year 2015. The sector is hugely important to Limerick, yet comparatively the County is underperforming, particularly so in relation to tourism hotspots and neighbouring counties.

Tourism is emphasised as one of the key sectors for future growth in the Limerick 2030: Economic and Spatial Plan for Limerick, which addresses the need for a joined-up tourism strategy for Limerick and a more coordinated approach to the development of this sector. The Plan stresses the need to establish a unique tourism offer that takes full advantage of Limerick's special heritage and environmental characteristics. The visitor economy, evening economy, sports related visitor economy, niche food and drink production, and arts and culture were all identified in Limerick 2030 as specific areas that would benefit from a more focused strategic direction. The need to increase the number of tourists who stay over-night or take short weekend breaks was also emphasised. For this, enhancements to facilities and attractions were recommended and the idea for an integrated tourism strategy that creates a multi-day offer for domestic and international visitors was proposed.

Tourism – Statement of Strategy and Work Programme 2017-2022 provided the initial response to the call for an integrated tourism strategy and also proposed measures to support the delivery of tourism objectives set out in Limerick Economic and Community Plan (LECP) 2016-2021. The Statement provided a

roadmap for tourism development across the City and County focusing on building competitiveness, product development and increased marketing. The aim of the Statement to increase visitor numbers to over one million and visitor spend to over €300 million per annum is reflected in this, the Tourism Development and Marketing Strategy 2017-2023. The Statement objectives including increasing both domestic and international visitors to Limerick, encouraging visitors to stay for a long duration, developing diverse tourist experiences and working with all relevant stakeholders to expand the tourism industry in Limerick, have acted as an important steer in the preparation of this Strategy.

This Tourism Development and Marketing Strategy aims to drive further growth and development, building on the major transformational achievements already underway across the city and county. It will ensure that Limerick is transformed into one of Europe's must see tourism destinations. By delivering on this tourism plan, it is envisaged that 1,500 jobs will be created. Limerick will attract 1.17 million visitors and generate €360.6 in revenue per annum by 2023 (as explained in Section 3.3.3).

The Tourism Development and Marketing Strategy also sits amid a wider strategy policy backdrop that includes the Limerick County and City Development Plans, and major tourism initiatives such as the Wild Atlantic Way (direct link to Foynes with Limerick City often marketed as the Gateway to WAW) and Ireland's Ancient East (direct link to East & South County Limerick). There are also a myriad of tourism plans and initiatives that direct activity on a localised scale within the city and county. The purpose of this Tourism Strategy is to provide a clear direction and enabling framework for a cohesive and integrated approach to tourism development and growth

in Limerick. Priority themes and associated transformational actions are proposed providing a framework to drive forward the sector so that Limerick can rival the success of neighbouring counties as a premier tourism destination, and deliver widespread benefits to the local economy and communities.

1.2 HOW THE STRATEGY WAS DEVELOPED

The Strategy was developed following a detailed analysis of the county's tourism offer, developed through comprehensive research of the tourism environment and involving a review of all available tourism information. This involved a wide range of sources, including: Fáilte Ireland, Limerick City and County Council, tourism attractions' own records, and direct conversations with tourism product providers and key stakeholders across the county.

Strategic conversations were held with several key stakeholders across the city and county to gain further insights on the character of visitor experiences, information on the resource or attraction and the potential for collaboration and future growth (a list of consultees is also provided in Appendix 1). Consultation was also carried out with members of Limerick Public Participation Network (PPN).

Four public workshops were held across the county - Adare, Templeglatine, Kilmallock and Limerick City. The workshops brought together voices from across the county in a range of sectors of relevance to tourism, and highlighted the wealth of knowledge and experience held by local people throughout the county. Further information on the outcomes of these workshops and the participants who attended is provided in the Workshop Outcomes Report.

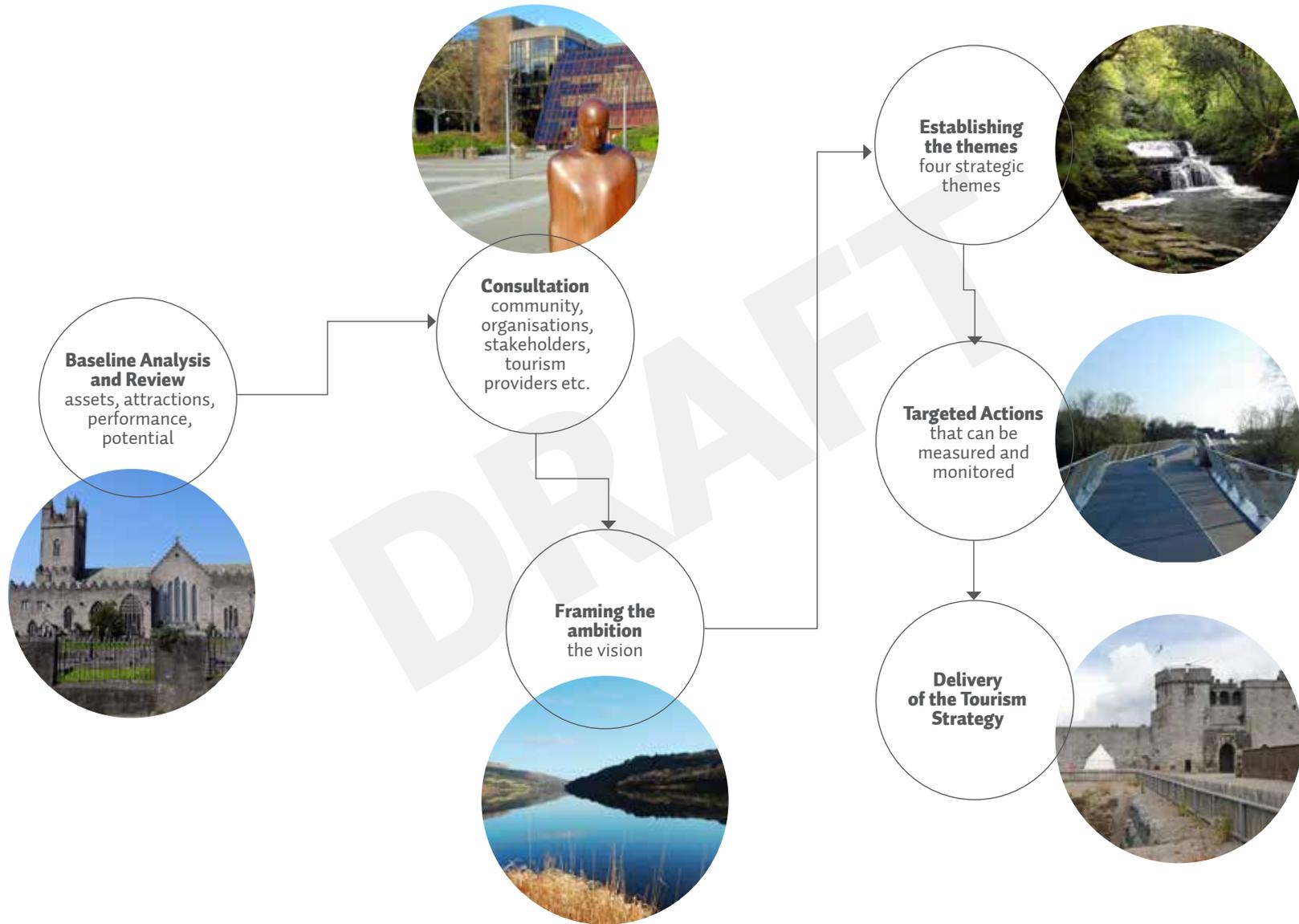


Figure 1 Limerick Tourism Development and Marketing Strategy – The Process

1.3 STRUCTURE

The Tourism Development and Marketing Strategy 2017-2023 is designed to respond to four fundamental questions as set out below. The responses to these questions provide a framework to unlocking the full potential for sustainable development of the tourism sector in Limerick, and set in place the five-part structure of this Strategy.

1. What do we want?

Section 2.0 The Ambition

- Objectives
- Targets
- A vision for tourism in Limerick

2. What is our current position?

Section 3.0 Tourism in Limerick – the story so far

- This section looks at the tourism base of Limerick in terms of the following:
- Building on the good work done – *the wider policy context*
 - The key ingredients – *an overview of the current tourism base (place, attractions, events, profile)*
 - Performance and Potential – *the current performance in terms of tourism.*

3. How can we optimise what we have and successfully grow the sector?

Section 4.0 Unlocking the Potential

Four Key Drivers:

1. Into the Blue
2. Energy Unleashed
3. Medieval Strongholds
4. Alive and Kicking

4. Who needs to be involved and when?

Section 5.0 Gearing up for Delivery

Leadership, connections, marketing, roadmap for delivery

Section 6.0 Monitoring and Evaluation

Monitoring and measuring progress



Figure 2 Limerick Tourism Development and Marketing Strategy – The Structure

2.0 *The Ambition*

2.1 THE VISION

Through a series of clear, coordinated actions across four thematic areas - waterways, activities, heritage, arts and culture, this strategy is designed to maximise Limerick's place, personality and position to stimulate strong growth in the sector, create jobs, and play a substantial role in achieving the aim of the Limerick 2030: Economic and Spatial Plan for Limerick to transform Limerick through an economic, social and physical renaissance.

Tourists will be attracted to Limerick because it is a place full of history and heritage with some of Ireland's best pre-historic and medieval sites; because it is a fun and creative place with a vibrant cultural, arts and music scene that is celebrated in the many different festivals and events held throughout the year; because it is a sporting centre of excellence and a rugby capital; and, because great adventures await those who wish to explore the county's diverse physical landscape. The people of Limerick are united in proudly promoting all that the city and county has to offer in a personalised and memorable way. The locals are friendly and laid back, and there is authenticity that abounds throughout the county that greatly appeals to international visitors who wish to experience the 'real Ireland'. Limerick is also a convenient place to visit, an accessible and well-connected place, both easy to get to and to move with ease in and around. With all this in mind, the overarching vision of this strategy is ...

'...Limerick will be internationally recognised as a world class location to visit.'





2.2 OBJECTIVES

Aligned to the vision are four strategic objectives which underpin the Strategy:

- Objective 1:

To ensure that Limerick is **internationally and nationally recognised as a highly appealing tourism destination** with a strong reputation for the quality of its water based, activity, arts and culture, and heritage attractions, for the vibrancy of Limerick City, and for the historical towns and rural villages where warm welcomes and authentic Ireland awaits.

- Objective 2:

To ensure a **coordinated approach to tourism and to galvanise the enthusiasm of key actors** by providing a strategic framework to optimise assets, create appealing places and enable the successful implementation of tourism actions and initiatives.

- Objective 3:

To support **strong growth in the tourism sector in Limerick** and to ensure that the economic and societal benefits of tourism of this are effectively distributed throughout the county by making vital connections between complementary sites and attractions, by encouraging visitors to move around the county, and to enable them to do so with ease.

- Objective 4:

To present a **delivery mechanism for national policies, objectives and targets that offer the greatest potential for growing the tourism sector** in Limerick and to act as a stimulus for transformational projects and initiatives proposed in wider tourism, and socio-economic plans for Limerick.

2.3 TARGETS (IN SUMMARY)

The Tourism Development and Marketing Strategy is designed to set in place a framework for the implementation of actions that will contribute to strong, consistent growth in the tourism sector in Limerick over the period 2017-2023, and in doing so, to achieve the following target:

To increase the total number of visitors to Limerick City and County to 1.1 million, generating €360.6 million in revenue and creating 1,500 new jobs in the tourism sector by the year 2023.

This will be achieved by:

- Reaching a target of +793,00 overseas visitors by 2023 with a revenue generating target of €313.2 million.
- Reaching a target of 379,706 trips from Irish residents to Limerick by 2023 generating €47.4 million in revenue.

Further information on targets to grow the tourism sector in Limerick is set out in Section 3.3.

1.1
million

€360.6
million in
revenue

1,500
new jobs



3.0 Tourism in Limerick – the story so far

The tourism themes and supporting actions presented in Section 4.0 of this strategy build on and advance the current tourism base in Limerick, the development of which has been guided by a myriad of national, regional, county and local plans and strategies (Section 3.1). The strategy seeks to optimise the full range of natural and physical assets that provide the foundation for tourism development in the city and county (Section 3.2). In doing so, it is envisaged that the strategy will provide a framework to capture new opportunities for economic and societal growth and prosperity greatly improving the city and county’s performance in the tourism sector (Section 3.3).

3.1 BUILDING ON THE GOOD WORK DONE

The wider policy context in which this Tourism Development and Marketing Strategy is based encompasses a range of national, regional, County and local plans that have been instrumental in guiding the tourism sector in Limerick to date. For this strategy to achieve the vision for tourism in Limerick and to meet the targets set out for growth to 2023, it is essential to coordinate and support the delivery of complementary initiatives taking place as part of other plans including for instance Limerick 2030: Economic and Spatial Plan for Limerick, the Local Economic and Community Plan (LECP) for Limerick, Local Tourism Plans, Public Realm Plans, Limerick Regenerational Framework Implementation Plan etc. Key elements of existing

plans, including significant initiatives, that this strategy takes its cue from, seeks to build upon and further advance, are set out in Appendix 2 Part 1.

Furthermore, Limerick benefits from a wide network of tourism agencies and actors. **These organisations and the support of local communities** are pivotal to the success of this county wide strategy, and it will be essential to gain their support through active participation in the delivery of the four thematic experience areas described in Section 4.0, and as part of the Tourism Forum referred to in Section 5.1 Gearing Up for Delivery.

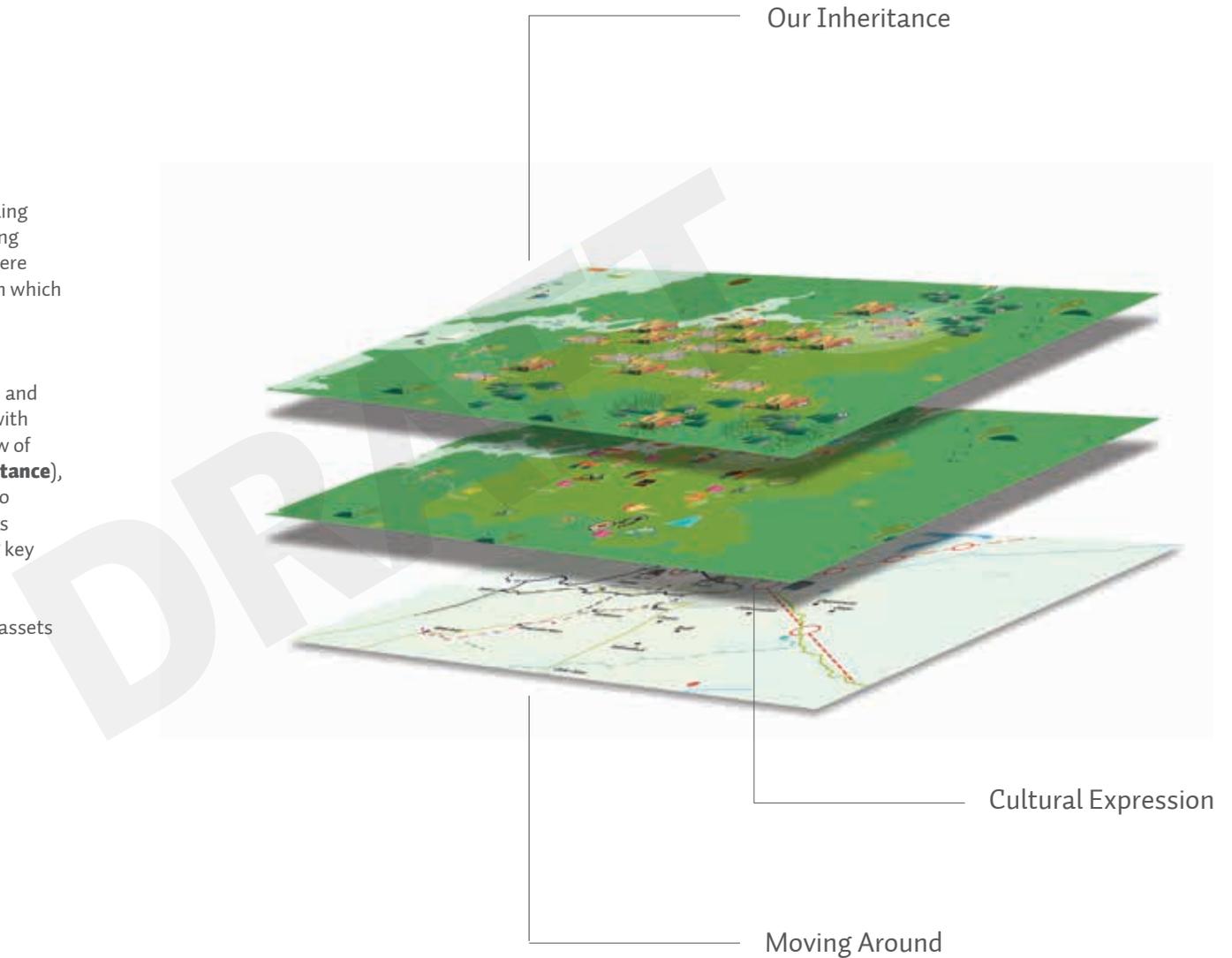


3.2 THE KEY INGREDIENTS

The natural and physical attributes of the county, its rolling hillsides, flat central plains, towns and villages, the strong physical presence of Limerick City, the people who live here and the cultural life of the place are the core elements on which tourism thrives.

In driving the successful development of tourism in the county, it is critical to consider these attributes in detail, and the ways in which visitors currently access and engage with them. As such, this section presents a summary overview of Limerick's landscape and historical features (**Our Inheritance**), the activities, culture and customs that bring the place to life (**Cultural Expression**), and the ways in which visitors are currently supported in moving around and accessing key attractions across Limerick (**Moving Around**).

For a detailed description of Limerick's existing tourism assets please refer to Appendix 2 Part 2.



3.2.1 OUR INHERITANCE

The Natural and Physical Environment

There is huge potential to share Limerick's landscape more with visitors – to offer visitors different ways to get into and up close to nature. A map (overleaf) which places Limerick City centrally shows how geographically well positioned the county is to offer visitor experiences within uplands, lakes, fertile agricultural plains, rivers, karst landscapes, coast and estuary. The Limerick visitor has the opportunity to experience uplands of various characters – already accessible by way of walking and cycling trails and loops - the Ballyhouras, Galtymore (highest inland point in Ireland), Slieve Felim Way, Mullaghareirk Mountains and the Clare Glens just north of Limerick City. The rich and fertile agricultural heartland of Limerick has supported communities for millennia, their marks still visible in the landscape across the county – and continues to provide a robust basis for contemporary food production. The rivers of the county and the Shannon Estuary make Limerick a place where water and waterside experiences can be at the centre of the visitor experience.



There is huge potential to share Limerick's landscape more with visitors – to offer visitors different ways to get into and up close to nature.

History and heritage

The built heritage inheritance has formed a cornerstone of Limerick's tourism approach to date, however, it is in need of a refresh to meet the changing needs of visitors, bringing the experience beyond “stones and bones”. There are great opportunities now to better communicate the stories of Limerick's portals into the past, to provide the visitor with a broader experience within historic settlements – with particular focus on good food - and to spread the benefits of tourism to communities across the county.

Physical connections to the past – through the medieval building boom, as far back as 812 when Viking settlers founded Limerick, and even further back to the mysteries of ancient monuments - are clearly evident in the network of historical sites and points of interest dispersed throughout the county in places like Lough



Gur, one of Ireland's foremost archaeological sites, or in the towns with significant monastic and Norman structures and appealing 18th/19th century vernacular streetscapes including; Kilmallock, Newcastle West, Rathkeale, Adare, Askeaton, Bruff and Bruree (refer to Our Inheritance map overleaf).



Our Inheritance



Uplands

1. Clare Glens
2. Slieve Felims
3. Mullaghareirk
4. Ballyhoura
5. Galtee
6. Silvermines
7. Slieve Bernagh
8. Arra



Rivers/Lakes

9. Shannon
10. Lough Gur
11. Lough Derg
12. Maigue
13. Feale
14. Deel
15. Mulkear
16. Abbey



Parks, gardens and natural sites

17. People's Park
18. Knockpatrick Garden
19. Boyce Garden
20. Ballynacourty Gardens
21. Coolwater Garden
22. Curraghchase Forest Park
23. Adare Park
24. Abbeyfeale Town Park
25. Ballyhoura Nature Trail
26. Griston Bog
27. Newcastle West Demesne



Medieval towns; castles and conquests, saints and scholars

28. King John's castle
King's Island
St. Mary's Cathedral
29. Glin castle
30. Desmond Castle
Franciscan Friary
31. Desmond Banqueting
Hall and Castle
32. King's Castle and
Dominican Priory
33. Desmond Castle
Augustinian Priory
Franciscan Abbey
Trinitarian Abbey
34. Desmond tower house
Augustinian Abbey
35. Purt castle
36. De Lacy castle
37. Glenstal Abbey

Portals to Ancient Ireland



Lough Gur/Grange
Stone Circle



Megalithic tombs



Knockadoon
habitation site





3.2.2 CULTURAL EXPRESSION

Limerick’s cultural environment and its people’s customs, traditions and values form the personality of the place, and thus how it presents itself to the world.

This is a hugely important aspect of Limerick’s tourism offering, and covers cultural legacies such as traditional music and story-telling, as well as the very much alive and kicking current arts scene which encompasses music, literature, dance, theatre, architecture, public, sculpture, digital, spoken word, visual and performance arts as well as emerging and exciting combinations of all of these.

Limerick is also renowned for its proud sporting heritage and this is key to the living culture of the place, embodying so much of what is great about Limerick and what is important to Limerick people. The county is synonymous with rugby, with Thomond Park, the home ground of Munster Rugby, and one of the city’s major attractions. There are also regular fixtures for Gaelic football and hurling games held across Limerick. Other recreational activities such as golfing, cycling, mountain biking, horse racing, and fishing, have also played a role in building a ‘great outdoors’ culture within the county, which is a critical part of the tourism product on offer within the county. Highlights of Limerick’s living culture and the many events / festivals that celebrate this are presented in the accompanying map. A detailed description is provided in Appendix 2 Part 2.



3
MERICK

BELONGING

Cultural Expression

Sports Centres of excellence

-  Thomond park
-  Swimming Pool (UL)
-  Pairc na nGael

Key Activities

-  Racecourse
-  Horse Riding
-  Skateboard park
-  Basecamp Action Adventure Park
-  Golf course/Pitch and Put
-  Mountain Bike Park
-  Outdoor Education Centre
-  Rock Climbing
-  Claybird and Archery Centre
-  Sailing
-  Off-road cycling
-  Kayaking
-  Fishing locations
-  Walking

Key Cultural Venues

-  Flying boat and Maritime Museum
-  Limerick City Gallery of Art
-  Adare Gallery
-  University Concert Hall
-  Dolan's Warehouse
-  The Hunt Museum

 Milk Market

 Theatres

Cultural Productions

-  Ballyhoura Ceramics
-  Orchard Pottery

Performance (festivals, events happenings)

-  EV + A International Art Biennale
-  Rambling houses
-  Fairy Trail
-  1 Band Championships
-  2 Fleadh by the Feale Traditional Music Festival
-  3 Riverfest
-  4 Michael Hartnett Annual Literary and Arts Festival
-  5 Ballyhoura International Walking Festival 2017
-  6 Great Limerick Run
-  7 Bloomsday
-  8 Foynes Irish Coffee Festival
-  9 Askeaton Contemporary Arts Festival
-  10 Cruinniú na Cásca (national day of culture and creative)



3.2.3 MOVING AROUND

Accessibility and intermodal connectivity is an important aspect of the strategy with measures to support and promote accessibility within the tourism framework of the county, in areas of strong visitor attractions and in identified areas of tourism development. At present, Limerick is a well-connected and accessible place with Shannon Airport located just 20 minutes from Limerick city.

A description of the county's major road, rail, air and sea links is provided in Appendix 2 Part 2.

Moving Around

 Shannon Airport/ *from Limerick City 20 min. drive time*

 Rail Line

 Train Stations

 Ports

 National bus route hub

 National Roads

 Motorways

Drives and Trails

 Ballyhoura Way

 Broadford-Ashford

 Great Southern Greenway

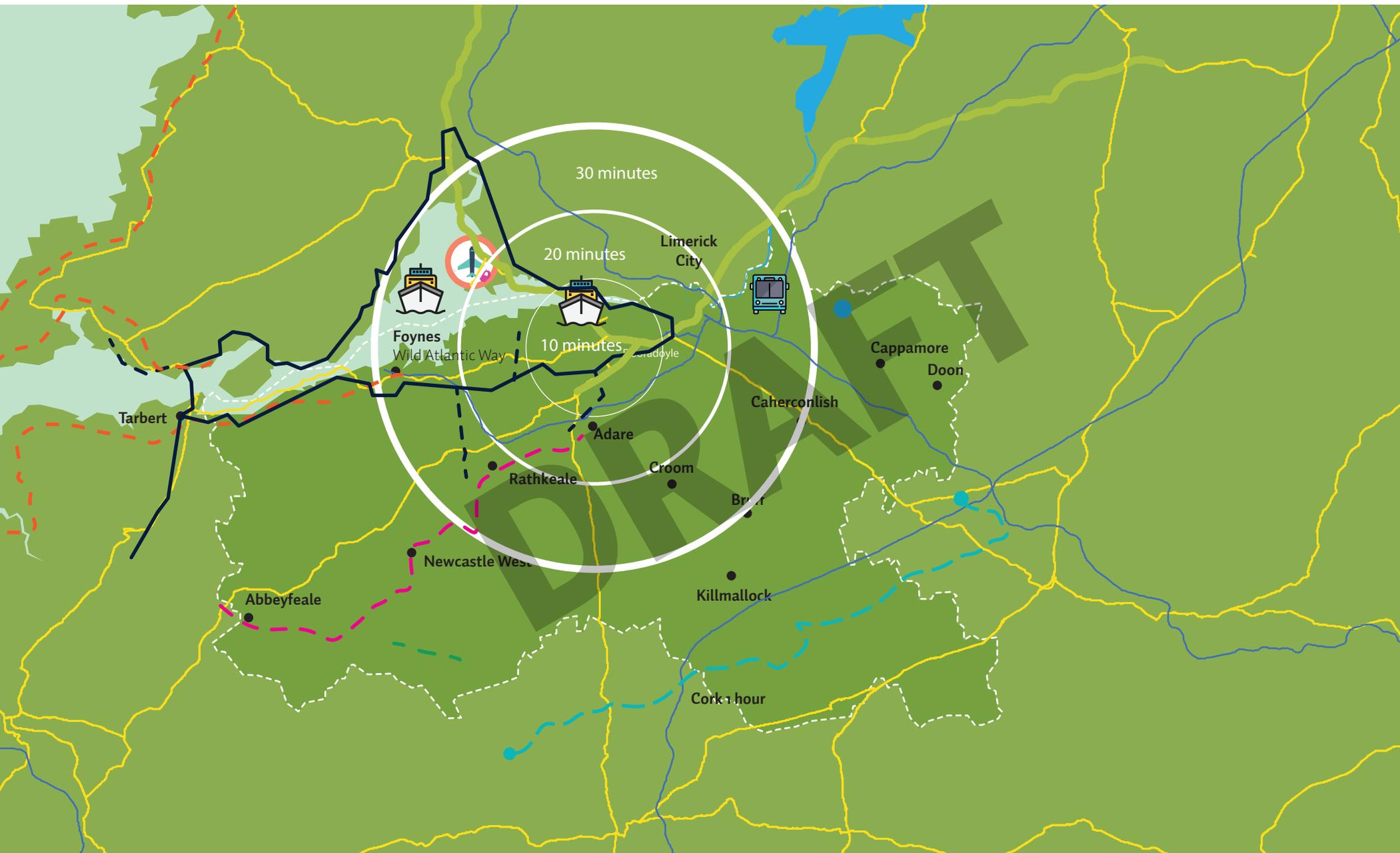
 Attychraan loop

 Clare Glens loop

 Shannon Estuary Way / WAW loop

 Wild Atlantic Way





3.3 PERFORMANCE AND POTENTIAL

Overview

Ireland's tourism sector has recently experienced a return to growth, a trend aided by several factors. These factors include overall economic growth in the country, growth in key overseas tourism markets as well as trends in exchange rate movements and inflation that have enhanced price competitiveness. In Ireland, the power of tourism to create jobs is estimated as follows¹:

- Every €1m of tourist expenditure helps to support 29 tourism jobs
- 1,000 additional tourists support 14 jobs in the tourism industry

Between 2012 and 2016, preliminary figures show that the total number of overseas tourists to Ireland increased by 39% increase to 8.7 million visitors in 2016² (Table 1). In terms of domestic trips, a growth rate of approximately 12% on 2012 levels was recorded for 2016 when 9.3 million trips were taken by Irish residents within the Republic.

In 2016, out-of-state³ tourist expenditure amounted to €5.0 billion. With a further €1.5 billion spent by overseas visitors on fares to Irish carriers, total foreign exchange earnings were €6.5 billion. With domestic tourism expenditure generating **€1.8 billion, tourism is a €8.3 billion industry in Ireland.**

Limerick's Performance

On a county level, the most up to date figures available indicate that overseas and domestic tourism to Limerick generated an annual revenue of over €244 million with close to 800,000 visitors to the county in the year 2015. This represents **2.9% of the total tourism expenditure for the State for that year.** Cork's contribution for the same year was 8.7%, with Kerry accounting for 5.2% of national share and 2.7% attributable to Co. Clare.

Overseas Visitors

Limerick was **the sixth most popular county in Ireland for overseas visitors in 2015** attracting 537,000 tourists to the area (accounting for 6.6% of all trips from overseas visitors). In revenue terms, this amounted to **€212million⁵** or an average spend per tourist of **€394.78 per trip.**

The number of trips taken by overseas tourists to each county along the **western seaboard** is between the years 2012 and 2016 is presented in Table 3. During this four-year period, 1,842,000 overseas tourists visited Limerick. While the notable year on year increase is positive, this represents just 9.1% of total overseas trips to these counties during this time.

Sixth most popular in Ireland for overseas visitors

€394.78
Average spend per overseas tourist per trip

Numbers (000s)	2012	2013	2014	2015	2016
Total Overseas	6,286	6,686	7,105	8,036	8,742
Domestic Trips	8,291	8,413	8,991	9,125	9,282

Table 2 National Tourism Numbers 2012-2016

¹ Fáilte Ireland (2016) Tourism Facts 2015

² Fáilte Ireland (2016) Tourism Facts 2016 Preliminary

³ Ibid. Out of State includes Britain, Northern Ireland, Mainland Europe, North America and Other Overseas

⁴ Fáilte Ireland (2016) Regional Tourism Performance in 2015

⁵ Ibid

Overseas tourists (000s) to each county	2012	2013	2014	2015	Total 2012-2015 (€million)
Cork	1,228	1,228	1,542	1,449	5,447
Kerry	826	877	1,040	1,026	3,769
Limerick	391	420	494	537	1,842
Clare	445	485	561	597	2,088
Galway	968	1,028	1,235	1,354	4,585
Mayo	245	218	259	302	1,024
Sligo	129	133	159	186	607
Donegal	174	199	252	289	914

Table 3 Overseas Tourists (000s) Numbers by County

Interestingly, the revenue generated by overseas tourism in Limerick (€633m) far exceeded that which was recorded for Clare (€435m) for the same period despite higher visitor numbers to this county (Table 4). This may be a result of Limerick City's role as an important accommodation hub for the Wild Atlantic Way, the wide choice of fee paying tourism

products and associated services available in Limerick, and the high visitor numbers passing through Shannon Airport in Clare. It is also likely to be reflective of Limerick's strong performance in the business tourism sector, one of the highest yield sectors in tourism (refer to page 42). In any case, the comparatively strong performance of Limerick in generating tourism revenue is

a positive indicator that Limerick is moving in the right direction in terms of its capacity to generate high revenue tourism, a key recommendation of national tourism policy⁶ which advocates a change in focus from overseas visitor numbers to overseas visitor revenue.

Overseas tourist revenue (€million)	2012	2013	2014	2015	Total 2012-2015 (€million)
Cork	399	433	550	558	1,940
Kerry	164	183	228	234	809
Limerick	116	136	169	212	633
Clare	86	94	128	127	435
Galway	253	308	350	475	1,386
Mayo	67	60	68	80	275
Sligo	30	44	43	51	168
Donegal	40	63	67	83	253

Table 4 Overseas Tourist Revenue (€million)

⁶ Department of Transport, Tourism and Sport (2015) People, Place and Policy - Growing Tourism to 2025

Where overseas visitors come from

The profile of Limerick's international tourism market can be presented by looking at the top four regions that visitors come from, i.e. Britain, North America (USA and Canada), Mainland Europe and the Other Areas. As illustrated in Figure 2, 37.24% of tourists came from Mainland Europe with 30.91% from Great Britain followed by the North American market which accounted for 24.95% of the total number of visitors (all figures are for the year 2015).

The tourist revenue generated by visitors from each overseas region during this period show that **North America visitors to Limerick are the most significant revenue generator** and represented the strongest growing market, followed by Mainland Europe⁷ (Table 5). With the success of the Wild Atlantic Way and the forthcoming extension of the brand to include Limerick as part of the Wild Atlantic Way Zone, growth in visitor numbers and revenue from the North American and Mainland Europe markets is set to continue as evidenced by the increase in air passenger traffic to Shannon Airport which reached 1.7 million in 2016 with a 5% proportional change increase on this for the month of February of this year⁸, a positive indicator for 2017.

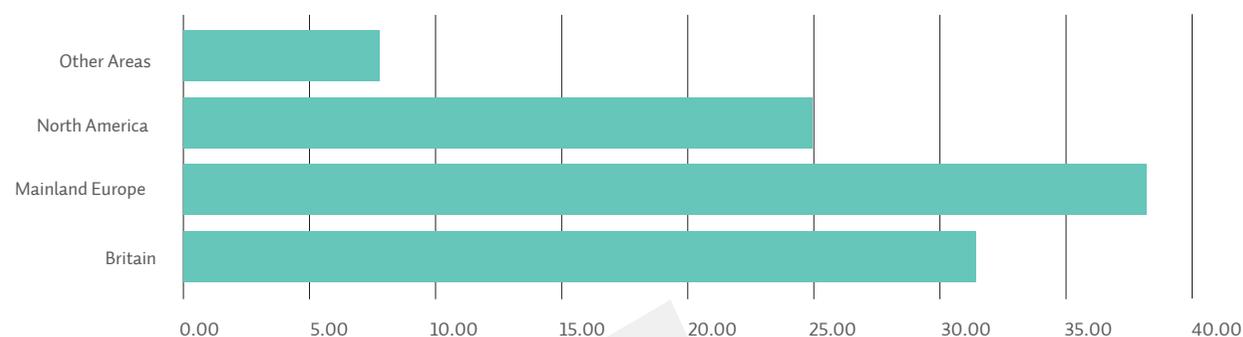


Figure 2 Limerick's International Tourism Market - Number of Visitors

Occupancy rates provided by Trending.ie for Limerick city hotels during the first 6 months of 2107 (Year to Date – YTD) and for June 2017 show that the **North American/US market continues to perform strongly** but that **Asian-Pacific nationalities and 'other' nationalities** present the strongest performing market segments based on hotel occupancy rates (Table 6).

While just a snapshot of performance, the 2017 occupancy figures show some cause for concern in terms of Limerick's performance in attracting visitors from Mainland European countries (despite relatively high visitor numbers in the 2012-2015 period). Limerick's relatively poor performance in this regard (first 6 months of 2017) is reflected in the performance of the Midwest Region as a whole which tends to be a less popular destination for markets such as Germany and France than other regions such as Dublin, the south west and the west.

Overseas tourist Revenue (€million) in Limerick	2012	2013	2014	2015	Total 2012-2015 (€million)
Britain	40	48	54	47	189
Mainland Europe	30	37	53	61	181
North America	40	47	52	80	219
Other Areas	6	4	10	24	44
Total	116	136	169	212	633

Table 5 Overseas Tourist Revenue (€million) in Limerick

⁷ Fáilte Ireland (2015) Regional Tourism Performance in 2015

⁸ Tourism Ireland (2017) SOAR (Situation & Outlook Analysis Report) May 2017.

Proximity to Shannon Airport



Limerick City is located just 20 minutes (19 kms) from Shannon Airport, Ireland’s third busiest airport after Dublin and Cork.

Passenger numbers at Shannon Airport have shown steady year on year growth since 2013. The most recently available figures for 2016 record 1.74 million people passing through the airport. Shannon’s strategic position as the most westerly airport in Europe is evident with the US market showing strong growth with 396,708 flying through Shannon from its five American destinations – JFK New York, Newark, Boston, Chicago and Philadelphia airports. This represents a 4% increase on 2015 figures. Currently, the UK market remains strong despite Brexit with an encouraging 7% increase in passenger numbers on 2015 levels. There are now 45 commercial daily movements at the airport with four new airlines recently announcing operations at Shannon – Scandinavian Airlines, Lufthansa,

Norwegian Air International and Kuwait Airways. This is hugely significant in terms of the potential for new tourism markets to the Shannon region. The proximity to Shannon Airport is a major asset to Limerick. Ensuring that visitors passing through the airport are made fully aware of the diversity and quality of the tourism products on offer throughout Limerick is crucial for Limerick to achieve its performance targets to 2023 (Section 3.3). From the perspective of business tourism, a market that is particularly important for Limerick (refer to Table 12), the proximity to the airport is hugely valuable giving Limerick a strong competitive advantage to other regional centres such as Galway, that should continue to be promoted and exploited.

Nationality	2017	
	June	Year to Date (YTD)
United Kingdom	1%	2.33%
United States	12%	10.33%
Germany	5%	3.33%
France	0%	0.17%
Italy	0%	0%
Spain	0%	0%
Australia	0	0%
Asia-Pacific	12%	14.5%
Canada	0	0.33%
Other	56%	44.33%

Table 6. Trending.ie Independent June 2107 report for Limerick – Occupancy by Nationality

Responding to Brexit

The traditional dependency on the British market (about 40% of all overseas visitors to Ireland are British) is a cause for concern nationally with the onset of Brexit. Tourism numbers (Figure 2) and revenue figures (Table 5) show the importance of the British market to Limerick – from which €189 million generated in tourism revenue between 2012-2015 can be attributed. As with all counties, Limerick must work harder to promote itself to the British market by focusing on assets such as its cost competitiveness, strategic location and diversity of attractions.

National tourism bodies such as Tourism Ireland are now focusing on the ‘culturally curious’ sector of the British market in particular (estimated to comprise 4.7m people) which tends to be older and less impacted by currency inflations. Aspects of Limerick’s tourism product that are likely to appeal to the ‘culturally curious’ include the history and heritage assets and the rich arts and culture scene that are central features of Limerick City and so many of the towns and villages across the county.

In recent years, national tourism policy to diversify the market and reduce reliance on the British market has moved to focus on targeting Mainland Europe and North America as the most significant overseas markets for Ireland. It will be important for Limerick to also diversify its tourism audience by exploiting its strategic location close to Shannon Airport and as part of the Wild Atlantic Way Zone, and to broaden its appeal to US, Asian-Pacific and Mainland Europe market. World travel trends show

that outbound trips increased by 3.9% in 2016 (based on 2015 levels), led by Asia (+11%), including 18% growth in the rapidly developing Chinese market, and the USA (+7%).⁹

The most recently available national level figures from Fáilte Ireland show the positive impact of promotional campaigns in the U.S, with strong visitor numbers that offset some of the shortfall on British visitors. The North American market is particularly important as a proven high revenue generator for Limerick. With direct and high frequency flights from Shannon Airport to major US population centres including New York and Boston, Limerick is exceptionally well placed to capitalise on this ever-growing market. ‘Great Escapers’ form the largest segment of the US market with an estimated 36.7m potential tourists that align with this consumer segment. Limerick will also have a broad appeal to international tourists as a value for money destination. This is particularly so on comparison to Dublin

where an under supply of accommodation has driven up the price of available bed spaces across all accommodation sectors.

In terms of Mainland Europe, the German market has continued to perform well in recent years with 50% of Irish hotels noting an increase in custom from Germany in 2017 compared to 2016. The South West is particularly popular with Germany holidaymakers with 50% choosing the region for their holiday in Ireland in recent years.¹⁰ Limerick’s strategic position relative to Kerry, the wider south-west region and the Wild Atlantic Way mean that it is a ‘stones throw’ away from some of the country’s most popular tourism centres. Extending the success of these centres to Limerick requires a proactive approach that highlights the many complementary attractions available across Limerick including those seamless connections such as the Shannon Estuary Way which will appeal, for example, to the estimated 16.6m Germans who fit the Great Escapers consumer segment.

⁹ ITB Academy (2017) ITB World Travel Trends Report 2016 / 2017. Available at: http://www.itb-berlin.de/media/itb/itb.d/all/itb_presse_all/World_TravelTrends_Report_2016_2017.pdf Accessed 31/10/17

¹⁰ Fáilte Ireland (201XX) Growing International Sales – Global Segmentation Toolkit. Available at: http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/2_Develop_Your_Business/3_Marketing_Toolkit/9_International_Sales_Toolkit/FI-Growing-International-Sales-interactive_1.pdf Accessed 31/10/17



A snapshot of the US Market

A Fáilte Ireland snapshot description of the US market¹⁰ shows the market segments that visitors correspond most closely to, as follows:

- 12.9m Culturally Curious
- 36.7 Great Escapers
- 26.4m Social Energisers

US visitors also tend to stay longer and travel around more than other nationalities visiting Ireland.

¹⁰ Main Overseas Market http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/2_Develop_Your_Business/3_Marketing_Toolkit/9_International_Sales_Toolkit/snapshot-of-the-market-p46-51.1.pdf

Domestic Visitors

The number of trips taken by Irish residents to each county along the western seaboard based on the most recently available figures show that Limerick attracted 257,000 trips by Irish residents in 2015 – falling significantly short of the performance of its counterparts along the western seaboard and highlighting the substantial scope that exists improve Limerick’s performance on the domestic tourism front.

Between the years 2012-2015, there were 969,000 domestic trips to Limerick (Table 7). This represents just 5.7% of total trips made to these counties during this time and demonstrates the significant scope that exists for increasing Limerick’s appeal to the domestic visitor market. With 9.1 million trips taken by Irish residents within the Republic in 2015, Limerick’s share was just 2.8%¹². This compares with 10.6% share held by Cork, 8.5% share held by Kerry and 4.5% share attributable to County Clare. Information published by Fáilte Ireland shows that domestic trips within Ireland are primarily generated by holiday makers (as opposed to business visitors) with short breaks accounting for 76.8% of these in 2015¹³.

Expenditure arising from 2015 domestic resident trips to Limerick totalled €32.9 million or a €125 spend per resident trip. For the years 2012 – 2015, the total spend by domestic tourism trips to Limerick was €133.9 million (Table 9). This compares to

Irish residents’ trips by county (000s)	2012	2013	2014	2015	Total 2012-2015
Cork	944	902	973	967	3786
Kerry	708	823	862	779	3172
Limerick	188	271	253	257	969
Clare	388	347	388	410	1533
Galway	720	834	916	895	3365
Mayo	385	458	524	463	1830
Sligo	242	207	223	263	935
Donegal	300	313	329	314	1256

Table 7 Irish Residents’ Trips - Number of Trips (000s) by County Visited 2012-2015

€359.7 million in Clare and €773.5 million in Kerry. Counties Mayo, Sligo, Donegal and Galway also outperform Limerick in terms of domestic tourism. While the significantly higher visitor numbers to these counties explains the difference in revenue levels in part, the spend per resident trip for Limerick is substantially lower than in other counties. For instance, Irish resident visitors to Kerry spend an average of €260 per trip, visitors to Clare tend to spend in the region of €247, the average spend amounts to €217 for visitors to Galway, while Irish visitors to Mayo generally spend around €201 per trip. While these figures suggest that Limerick is failing to capitalise on the relatively small number of Irish residents who do visit the City and County, they also highlight an opportunity to promote Limerick as a highly cost competitive destination.

While there is no known study that has considered the reasons for Limerick’s underperformance in the domestic tourism market, Limerick has not been as successful in establishing itself

as a tourism destination particularly in comparison to its neighbouring counties - Clare and Kerry which benefit from a long established and deep rooted association with tourism in Ireland.

Figures captured by Trending.ie on year to date occupancy rates for hotels in Limerick reveal a 24.67% occupancy by Irish nationals in the first six months of 2017.

Nationality	2017	
	June	Year to Date (YTD)
Ireland	14%	24.67%

Table 8 Trending.ie Independent June 2107 report for Limerick – Occupancy by Nationality

¹² Fáilte Ireland (2016) Domestic Tourism 2015 – An overview of Irish residents’ travel within the Republic of Ireland. Available at: http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3_Research_Insights/3_GeneralSurveysReports/Domestic-tourism-performance-in-2015-v3.pdf?ext=.pdf Accessed 06/11/17.

¹³ Ibid.

Total domestic expenditure (€million)	2012	2013	2014	2015	Total 2012-2015 (€million)
Cork	180.3	150.9	171.3	171.0	673.5
Kerry	171.6	200.7	198.4	202.8	773.5
Limerick	25.2	37.4	39.2	32.1	133.9
Clare	88.1	87.2	83.2	101.2	359.7
Galway	143.4	150.7	201.0	194.1	689.2
Mayo	84.5	109.6	118.6	93.3	406.0
Sligo	39.1	42.2	43.0	61.2	185.5
Donegal	73.0	67.8	89.2	75.7	305.7

Table 9 Irish Residents' Trip Expenditure by Visited County 2012-2015



Where do visitors stay in Limerick?

ACCOMMODATION TYPE

Fáilte Ireland's publication on visitor accommodation capacity¹⁴ details the current stock and capacity of accommodation in Ireland (Table 10). In terms of hotel provision in Co. Limerick, a total of 28 hotels were registered with Fáilte Ireland at the end of 2015. The majority of these are three-star (almost 53% of bed spaces) and four-star hotels (38% of bedspaces).

There are 74 properties listed on the top accommodation booking website, Booking.Com, 38 of which are located in Limerick City and environs. The accommodation listings on the recently revamped Limerick.ie website returns 125 results comprising a mix of hotel, B&B and self-catering options. Visitors wishing to explore east Limerick can stay at the Deebert House Hotel in Kilmallock, or any of the bed and breakfast and self-catering holiday home options on offer in Kilmallock, Kilfinane, Ardpark and Bruff. There are three hotels in Adare, West Limerick including the luxury Adare Manor Hotel and Golf Resort, Fitzgeralds Woodlands House Hotel, the Dunraven Arms Hotel. The Mustard Seed Country House Hotel is located close by in the village of Ballingarry. The Devon Inn Hotel in Templeglantine is another good base from which to explore West Limerick, or the range of B&B's, self-catering, and camping / caravan park options available in the area.

HOTEL PROVISION

Comparatively, hotel capacity in Limerick is far below that which is offered in other Irish cities and tourism destinations – Galway, Dublin, Cork and Kerry (Table 11). Considering all accommodation types on offer in the county (hotels, guesthouses, B&BS, self-catering, caravan/campsite and hostels), the total number of premises at 72 in 2015 still falls short of the number of premises available in any of the counties listed above for hotel accommodation only.

Accommodation type	Premises	Units	Beds
Hotels	28	2,171	4,988
Guesthouses	2	36	69
Bed and Breakfasts	34	140	343
Self-catering properties	6	107	689
Caravan and Campsites	1	28	112
Hostels	1	-	109
Total:	72	2,482	6,310

Table 10 Accommodation Types in Limerick

County	Hotel Premises	Rooms
Dublin	147	18,531
Cork	78	4,523
Galway	79	4,351
Kerry	73	5,169
Limerick	28	2,171

Table 11 Hotel provision in other counties

¹⁴ Fáilte Ireland (2015) Accommodation Capacity by County 2015

OCCUPANCY

Occupancy rates for Limerick city hotels have significantly improved in recent years on 2015 levels¹⁵. Monthly occupancy reports published by Trending.ie show an occupancy rate of 87.4% for Limerick hotels in June 2017 compared to 82.5% in the same month in 2016, a growth of 4.9%. Year to date (YTD) occupancy rates for the first 6 months of 2017 compared to the first six months of 2015 show an increase of 5.2% (from 62.8% in 2015 to 68.0% in 2017). Comparatively, Limerick's occupancy rates are falling behind other regional cities such as Cork and Galway (which reported YTD rates for June 2017 of 76.3% and 69.7% respectively).

However, despite Limerick's comparative performance, the strong gains made in occupancy for the month of June 2017 is encouraging and is also reflected in revenue per available room (RevPAR) which had increased to an average €67.58 compared to €49.39 in June 2015 – a RevPAR growth rate of 36.8%. Limerick has retained its cost competitiveness with RevPAR rates for June 2017 significantly lower than Galway for which RevPAR of €98.55 was recorded in June 2017 and Cork where the average room cost €94.06 in June 2017. Limerick's room rates were also lower than the national average for the same month of €89.02. With value for money a high priority for both domestic and international tourists, Limerick has a strong competitive advantage in this regard.



¹⁵ Trending.ie hotel occupancy figures incorporate domestic and overseas visitors to Limerick.

What type of visitors stay in Limerick?

An independent report for June 2017 prepared by Trending.ie shows the strong importance of the corporate visitor market to Limerick. In June 2017, 63% of city hotel occupants were comprised of corporate individuals or groups with the leisure market accounting for 35% (Table 12).

Market Segmentation	June	Year to Date - YTD
Corporate (Groups & Individuals)	147	18,531
Leisure (Groups & Individuals)	78	4,523
Transient – Online Travel Agency	79	4,351
Banqueting	73	5,169
Other	28	2,171

Table 12 Trending.ie Independent June 2107 report for Limerick – Market Segmentation

What attractions do visitors go to in Limerick?

The review of Limerick's tourism products has identified a wide array of attractions, facilities, services, events across the county. Fáilte Ireland collates the numbers of visitors to registered attractions across the country, several of which are located in Limerick (Table 13)¹⁶. This shows that the Hunt Museum followed closely by King John's Castle are Limerick's biggest tourist attractions. It should be noted, however, that these figures are for registered tourism attractions only and do not incorporate wider visitor attractions such as Limerick City's Thomond Park and St. Mary's Cathedral.

Attraction	2010	2011	2012	2013	2014	2015
The Hunt Museum (fee charging)	-	-	-	-	-	108,000
King John's Castle (fee charging)	37,953	38,221	38,752	47,360	84,819	107,076
Limerick City Gallery of Art (free)	20,000	10,000	59,000	67,000	77,890	82,525
Ballyhoura Mountain Bike Trails	50,000	60,000	62,000	60,000	70,000	70,000
Foynes Flying Boat Museum	32,000	32,133	32,261	33,549	36,634	40,578
Desmond Banqueting Hall	3,324	3,702	4,290	9,205	11,362	11,150
Limerick City Museum	14,784	13,498	9,460	4,000	9,145	16,075
Griston Bog Ballylanders - Outdoor Classroom	-	-	-	5,000	5,500	5,000
Pallaskenry Agricultural College	620	790	800	800	920	-
Boyce Gardens	1,000	600	600	550	600	-
Knockpatrick Gardens	350	360	340	450	500	600
Ryans Honey Farm	150	-	-	135	130	-

Table 13 Visitor Numbers for Fáilte Ireland Registered Tourism Attractions

¹⁶ A detailed listing of visitor numbers to top attractions in Ireland (including 12 attractions in Co. Limerick) is provided as part of Fáilte Ireland (2016) Fáilte Ireland's visitors to tourist attractions 2014 – this covers the period 2010 to 2014. The most recently published list of visitor attractions are recorded Fáilte Ireland (2016) Fáilte Ireland's visitors to top fee charging attractions 2015 covers 2015 only and includes 3 attractions located in Co. Limerick. Limerick.

Tourism businesses

A wide range of businesses in Co. Limerick are engaged in activities that support or are supported by tourism. Based on the April 2016 Activity's Listings database published by Fáilte Ireland¹⁷, there are 118 tourism businesses in the county registered with Fáilte Ireland. The figures provided in Table 14 are those as set out in the Fáilte Ireland database and while not a complete list of tourism businesses based in the county, it nevertheless offers an insight into the level of tourism targeted activity happening in the county, based only on the number of businesses registered with the national tourism body. The figures also highlight the need for greater awareness among tourism providers and in particular the service sector (i.e. restaurants, pubs/bars/cafes) of the potential value that registering with the national tourism body can make to their business.

For comparative purposes, the number of tourism businesses located in the counties along the west coast of Ireland are set out in Table 15, with the lowest share recorded for Limerick.

Activity Category	Number
Activity Operators and Tour Guides	18
Bike rental	3
Crafts	3
Equestrian Centres and Stud Farms	5
Angling	1
Restaurants	33
Pubs/Bars/Cafes	25
Golf and pitch and putt	3
Food shops or markets, markets, cafes, souvenirs	11
Parklands, Nature and Wildlife	10
Hotel Spas	5
Trace your Ancestors	1

Table 14 Business involved in tourism in Co. Limerick as registered in Fáilte Ireland activities list for 2016

County	No. of businesses registered with Fáilte Ireland
Kerry	400
Cork	471
Limerick	118
Clare	221
Galway	319
Mayo	195
Sligo	125
Donegal	257

Table 15 Tourism business along the west coast counties that feature on Fáilte Irelands Activities Listings 2016



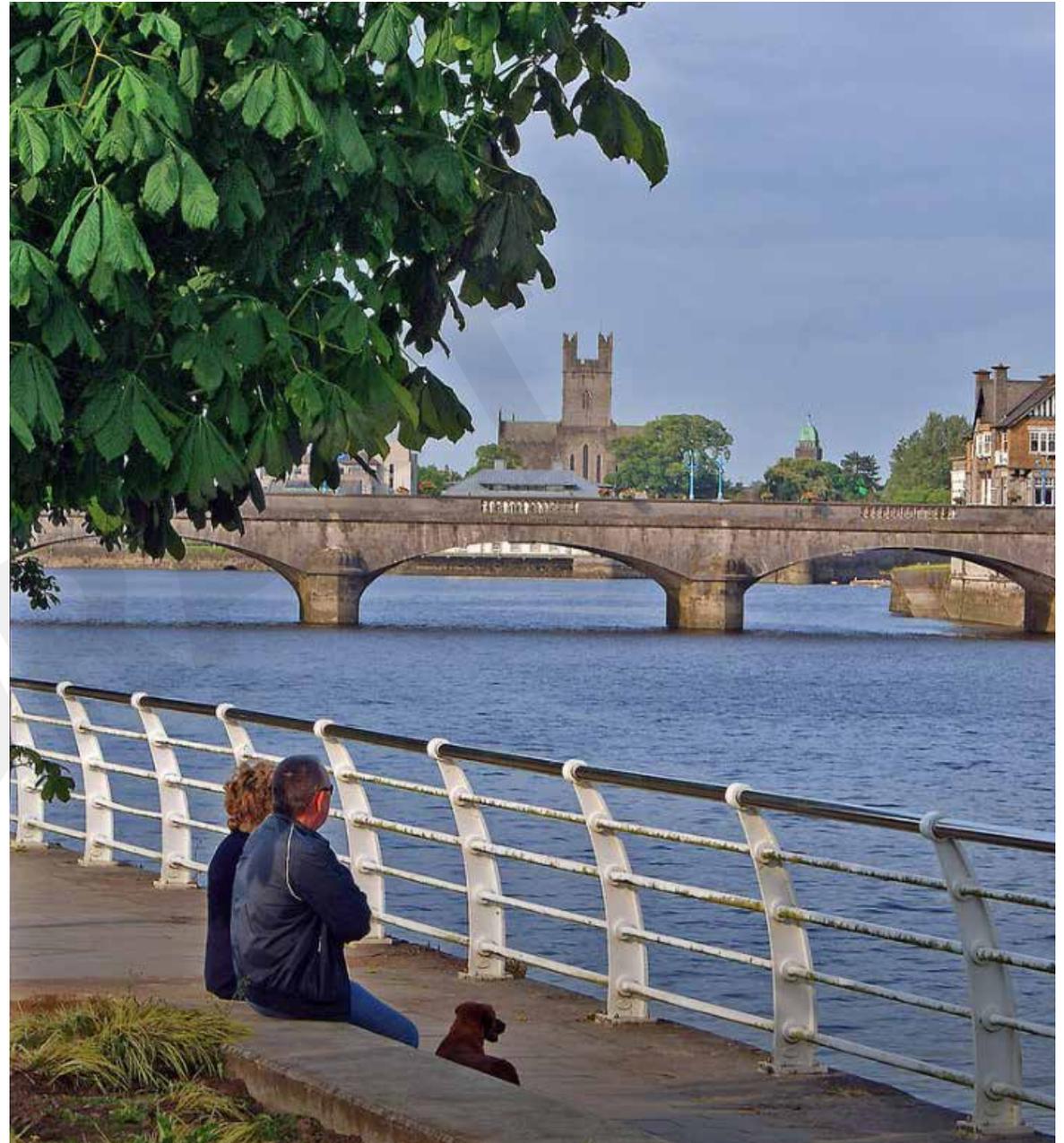
¹⁷ Fáilte Ireland (2016) Activities Listing 7 April 2016. Available at: <http://www.failteireland.ie/Research-Insights/Open-data.aspx> Accessed 27.04.17.

3.3.2 POTENTIAL

Priorities for Growth

The best prospect for growing Limerick’s tourism sector lies in generating increased levels of overseas revenue. This is the focus of the Government’s People, Place, and Policy Growing Tourism to 2025 which aims to increase the economic contribution of tourism to the Irish economy by increasing the value of tourism service exports

In order to achieve the national visitor revenue target of €5.0 billion by 2025 which has been set for the performance of Irish tourism, tourism plans need to be formulated on the basis of those regions and consumer segments which have the strongest prospects for revenue growth in the medium to long term. The key ‘region’ or ‘proposition of scale’ as far as Limerick is concerned is the Wild Atlantic Way. While Limerick also falls within the sphere of influence of Ireland’s Ancient East and may have a role in a further proposition being developed relative to Ireland’s waterways and lakes it must remain true to its own distinctive sense of itself – where it has come from, how it is changing, its ambition for the future – as well as its particular appeal to a range of audiences whether these are holiday visitors from abroad or elsewhere in Ireland who stay overnight; business visitors who may also spend some leisure time here as part of their trip as well as leisure day visitors who visit for a particular event; participate in an activity or visit something of interest – some of whom could be classed as tourists albeit not staying overnight in the Limerick region.



Lessons Learned

Limerick's current performance in the tourism market indicates the strong potential that exists to further increase Limerick's market share of tourism expenditure for the state. Key lessons that emerge from Limerick's current performance in the tourism market are as follows:

- With further growth set for the Irish tourism industry, substantial scope exists for Limerick to increase its contribution to overall national tourism revenue.

- The opportunity to take advantage of Limerick's strategic position within the Wild Atlantic Way Zone and in close proximity to some of Ireland's most popular tourism centres by encouraging seamless journeys into the city and county, and enticing visitors to stay on and explore an authentic slice of the real Ireland offered by lesser known sights, attractions and places across Limerick.

- The overseas market is performing well but there is significant scope to strengthen Limerick's appeal to Mainland Europe, the US and Asian Pacific, three key markets for Limerick. This is particularly important given the anticipated impact of Brexit on visitor numbers from the UK. Promoting Limerick's appeal as an easily accessible, value for money and diverse holiday destination that responds to the expectations of a broad visitor base (refer to key audiences set out on page 48) will be central to this.

- There is huge scope to increase performance in the domestic tourism market. The national domestic market is expected to pick up further as finances continue to improve. Cost is a high priority for domestic holiday makers and Limerick's cost competitiveness as a holiday destination must be more heavily

promoted. Research published by Fáilte Ireland in 2016 indicate that almost 80% of those likely to take a holiday in Ireland in the next twelve months stated that they would always compare costs and prices before making a decision¹⁸. Sixty-two per cent agreed strongly that they would compare costs and prices before making a decision.

Furthermore, promoting the abundance of heritage sites across Limerick and the opportunities for hiking, walking and water sports, all of which rate highly on the activity lists of domestic holiday makers, is important.

- The growth in hotel occupancy experienced in recent years has been fuelled by corporate tourism followed by leisure tourism. With Limerick's proximity to Shannon Airport, the potential to expand the business and leisure (bleisure) market is significant (refer overleaf).

- Limerick's most popular tourism attractions to date tend to be heritage, arts and culture and activity based. A more targeted visitor centric approach is required from the wider service industry in Limerick in order to capture all opportunities to extend current visitor expenditure – encouraging businesses to register with Fáilte Ireland is a key first step in this.

¹⁸ Ibid no. 12

Business Tourism

Business tourism is a fast growing and lucrative market segment which has continued to perform well even in difficult times. Ireland is regarded as being well positioned relative to value, individuality and a mid-range capacity for conferences and events. It contributed €669m to the Irish economy in 2015, accounting for 16% of overseas tourism spend. The type of events that Ireland predominately attracts includes conferences, corporate meetings, trade fairs and incentive trips.

Generating increased levels of overseas revenue is crucial to growing the tourism market in Limerick and business tourism has a central role to play in this. With corporate tourism identified as one of Limerick's strongest markets (Table 12), the capacity to attract further growth in this area must continue to be enhanced. Limerick is ideally positioned to market itself as a business tourism destination by taking full advantage of its proximity to Shannon Airport (with passenger numbers of 1.47 million people in 2016) and the opportunities that exist for the business leisure tourism or the 'bleisure' market. In this regard, the success and international profile of the Wild Atlantic Way (WAW) must be a recognised as a huge advantage that can be exploited to greater effect particularly as the Wild Atlantic Way Zone, which Limerick City and County will form a part of, is launched and established as a complement to the WAW. Further to this, the various actions set out to enhance Limerick's offering in terms of waterways, activities, heritage, and arts and culture (as captured in the four themes set out in Section 4.0) will strengthen Limerick's wider appeal and with collective action across the themes will provide a high quality leisure offering to encourage business tourists to stay on and explore all that the city and county has to offer.

Limerick is well recognised on a European level as a great place to do business with the recent accolade of Micro European City of the Future 2016/17 bearing testament to this. Limerick was ranked in second position for 'Economic Potential' and 'Business Friendliness' and 'FDI Strategy' within Micro European Cities and secured fourth place for 'Human Capital and Lifestyle'. Limerick's success in this regard has been linked to its high performance in securing Foreign Direct Investment (FDI) in recent years. The accessibility afforded by Shannon Airport to European markets, its cost competitiveness, the quality of its research and academic institutes, the talented local workforce and the high quality of life offered by living in a compact city with some of Ireland's most scenic landscapes on its doorstep have all played a role in attracting international firms to Limerick. With strong population growth and jobs targets set out for Limerick City as part of the Ireland 2040 Our Plan: Draft National Planning Framework , Limerick is primed to increase its share of FDI nationally.

With this, the requirement for a large, multi-purpose conferencing and events space is even more pertinent. The Shannon Region Conference and Sports Bureau, the official events bureau for Ireland's Shannon Region, has responsibility

¹⁹ Di Intelligence (2017) European Cities and Regions of the Future 2016/17. Available at: <http://www.fdiintelligence.com/Rankings/European-Cities-and-Regions-of-the-Future-2016-17> Accessed 31/10/17

²⁰ A Government of Ireland Policy (2017) 'Ireland 2040 Our Plan - Draft National Planning Framework'. Available at: <http://npl.ie/wp-content/uploads/2017/10/Ireland-2040-Our-Plan-Draft-NPF.pdf> Accessed 31/10/17

for attracting international conferences, sporting and culture events to Limerick and the wider Shannon Region. In 2016, these events brought over €7 million to the economy of the Shannon Region. So, while Limerick has a good track record in attracting major conferences and events including close to 40 events in 2016 such as the Japanese Karate Association World Championship there is huge potential to further improve performance.

The absence of a large, state of the art events/conference space limits the full potential of Limerick to compete to its full potential internationally. Attracting large international conferences and events to Limerick is a challenging undertaking and one that will not reach fruition unless the vital infrastructural supports are in place. A fundamental requirement for large international conferences and events is a state of the art, multi-purpose space. The development of such a space at a central location in Limerick city such as, for example, the Cleeves Riverside Campus development would represent a major step forward in Limerick's ambition to become an internationally recognised tourism destination. In addition to acting as a world class conferencing facility, it would also be capable of hosting large events spanning the four thematic areas proposed in the Tourism Strategy, and would help to support the viability of wider plans and initiatives for Limerick. These include Innovate Limerick's plan to develop a National Sports Business Cluster in Limerick.



The extensive consultation carried out in preparation of the Tourism and Marketing Strategy highlighted other attractors that bring huge visitor numbers to the county, these include the many sporting events, most notably rugby. A spin-off of Limerick's excellent sporting reputation and facilities is the potential for a sports innovation and business cluster. The broader calendar

of festivals and events that take place throughout the year is another significant aspect of the tourism economy, and one which spans multiple domains from heritage to adventure activities and food. These aspects, and many more, are described in Appendix 2 Part 2 and in the case examples provided below and have also been integrated as actions under the four themes set out in Section 4.0.

Sports Innovation and Business Cluster

Sports tourism represents the fastest growing sector in global tourism.

According to the World Tourism Organisation (2013), it generates €450 billion annually and is anticipated to grow in the region of 14% per annum. Given Limerick's world class facilities, reputation and passion for sport, it is ideally placed to target the international sports tourism market. There is huge potential to develop the sector in Limerick with several initiatives currently in train to progress the sector. For instance, Innovate Limerick's plan to develop a National Sports Business Cluster Limerick is intended to optimise on the success of Limerick's elite sporting facilities including UL's sports campus, LIT's Sportslab (Europe's leading strength and conditioning centre) in Thurles and the wide range of companies involved in other sports-related activities, from sports tech to nutrition companies based in Limerick.

Festivals, Events and Business Tourism

Successful events can bring significant direct economic and societal benefits while also providing a major opportunity to create a positive impression of the area, that can have far reaching consequences for the wider tourism industry.

A report on the Festival and Events sector in Limerick²¹ published in Autumn 2016 as part of the Limerick Cultural Strategy 2016-2030 and Limerick Economic and Community Plan 2030, found that there were 80 regular festivals and events across the county, covering 25 sectoral areas including music, poetry, literature and film. The audience for these events was in the region of 363,000 people. The sector is growing in Limerick with a 76% increase

in funding secured for 2017 from Fáilte Ireland's Regional Fund for Festivals. The report highlighted wide ranging social, economic and cultural benefits that the sector can bring, and proposed a series of recommendations to grow the sector further which this strategy endorses.

The calendar of events in the county includes both events of national stature down to smaller specialised or local events showcasing local activity. These events celebrate all that is great about the county with sports, food, music and dance featuring strongly. A selection of notable festivals and events held in Limerick is provided in Appendix 2 Part 2. Many of these are well established annual or bi-annual events. Limerick has also been moderately successful in securing one off touring events with recent examples including the Global Karate Championships and the World BBQ Championship held in Limerick in October 2017.

²¹ Limerick City & County Council (2016) Let's Talk Festivals – Research for A Framework for Limerick Festivals and Events. Prepared for Limerick City & County Council by GM Innovations.



Golfing holidays

The International Association of Golf Tour Operators (IAGTO) is working with national tourism bodies – Fáilte Ireland and Tourism Ireland to target overseas markets that have a potential to deliver increased golf business to Ireland, in particular to tap into the growing golf market in Asia.

Globally, according to IAGTO, golf tour operator sales continued to grow last year, making 2016 the fifth year of consecutive growth - with sales on average up 7.5% year on year. Regionally, Asia Pacific grew 6.2% last year and Asia Pacific is showing the highest growth rate amongst all regions for forward bookings – showing growth of 8.2% in January 2017 compared to the previous year.

Research undertaken by Fáilte Ireland on the value of the golfing sector to the Irish economy²¹ shows that the sector currently generates a total overseas spend of €200m for the Irish economy with more than 160,000 international visitors playing golf while in Ireland in 2016. With each golfing visitor contributing an average of €1200 to the economy- two and a half times that of the average tourist – the potential to grow the market further is evident.

Strong growth is also apparent in the domestic golfing market with 43% of golf clubs nationally reporting an increase in Irish green fee custom²² and this should form an important element of Limerick's bid to attract more domestic visitors. With most Irish resident holiday makers preferring short breaks of 1-3 days, golfing weekends are likely to appeal.

²¹ Fáilte Ireland (2017) New Fáilte Ireland research shows golf to the fore in delivering tourism revenue (online) Available at <http://www.failteireland.ie/Footer/Media-Centre/New-Failte-Ireland-research-shows-golf-to-the-fore.aspx> (Accessed 06.09.17).

²² Fáilte Ireland (2017) Tourism Barometer – September 2017. Available at: http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3_Research_Insights/3_General_SurveysReports/Failte-Ireland-tourism-barometer-September-2017.pdf?ext=.pdf Accessed 31.10.17





As tourism is well defined both internationally²³ and nationally, it is not within the power of the local authority or the industry locally to change that definition. There is scope, however, to interpret it differently. Tourism is an economic activity which Limerick recognises as being important. It is the local authority's job to create the conditions which support the growth of that economic activity. While tourism as an economic activity describes tangible, quantifiable, transactional events, a successful tourism sector depends upon much that is intangible and qualitative in nature. **Tourism depends on the qualities of place in particular.** No matter how good an individual tourism business is, it will not thrive unless the quality of the broader environment is the best it can be. The opportunities to attract more customers, to add value and therefore generate higher spending, are all dependent on the quality of this broader environment.

The Visitor Economy – A Place Centred Concept

There is an important distinction which needs to be made between the person-centred concept of a 'tourist', which is defined so as to allow the measurement of the economic activity of that person, and the place-centred concept of the 'visitor economy', which is concerned with the whole environment within which tourists, and other visitors, operate. The concept of the visitor economy recognises the importance of these more qualitative factors and of the wider set of individuals and organisations that are all key to the success of the destination. While the economic activity of visitors lies at the core of the concept of the visitor economy its meaning is broader than this and includes all of the elements that make for a successful visitor destination such as:

- All of the things which we know attract visitors; the natural environment, the heritage and culture, iconic buildings, sport, the retail leisure and cultural facilities, food, gardens, the events, the scenery; all the things which make a place special, distinctive and capable of engendering pride and interest and a place worth experiencing.

- The infrastructure which helps to reinforce and shape the sense of place and make it an easy place to visit; the signs, the transport – including access transport through airports and ports-, parking and orientation, interpretation, public space, amenities, etc.

- The services which cater for the needs of visitors (and of residents) and create economic and social activity and increase spending; including the hotels and bars, pubs and restaurants, galleries, the everyday events and the day-to-day services which make the place clean, safe and welcoming.

Key Audiences – Potential Visitors

In thinking about the visitor economy, the starting point has to be the quality of the experience which Limerick provides. The quality of the visitor experience matters to tourism and to tourists, as well as to visitors more generally and it is also important for people whether they are involved / want to be involved in the business of tourism or are affected by it. It also matters to the wider economic and social success of the destination and the region. Destinations need visitors who will spend money. A good understanding of potential visitors will enhance Limerick's capacity to design and deliver those experiences which will succeed in attracting the visitors which Limerick wants; provide them with experiences they will enjoy and value and increase economic benefits to Limerick.

While Tourism Ireland and Fáilte Ireland will continue to target Ireland's key 'culturally curious' audience, who have the strongest propensity to visit the island of Ireland, they will also reach out to the 'social energiser' and 'great escaper' audiences in markets where significant potential exists. Tourism Ireland will also target niche segments – including golfers, business and incentive visitors, as well as the diaspora in Britain, North America and Australia. Within this wider context there are specific opportunities for Limerick to focus on. These include:

²³ The UN World Tourism Organisation defines tourism as comprising the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited

Key Audiences – Potential Visitors

Social Energisers

- these audiences are leading the way
- they have grown up in a Digital Age
- they seek out cultural immersion – food, local hotspots, activities
- they are influenced by online reviews and user generated content
- they are millennials and young couples/adult groups typically in their late 20s to early 30s



Great Escapers

- these audiences are in serious need of time out from busy lives and careers
- they are interested in rural holidays, getting physical with nature
- they appreciate peace and quiet between activities - the point is the trip itself. It's 'down time', it's being off the beaten track, it's a great escape
- they want to actively explore more remote and exciting places, on foot or by bicycle
- they tend to be couples in their 30s often with young children

Culturally Curious

- these audiences invest in activities, not just relaxation
- they expect hassle free, convenient experiences
- they expect safety, cleanliness, value
- they are part of the baby boomer generation aged 40 or over.



Targets

Based on Limerick’s current performance in both international and domestic markets, general confidence held in the market²⁴, and national targets to reach €5 billion in overseas revenue by 2025²⁵, overseas and domestic visitor numbers to Limerick and associated revenue targets are set out below.

Targets for the overseas visitor market to the year 2023

A 5% year on year growth rate target applied over a 7-year period starting from 2015 would result in 793,393 overseas visitor trips to Limerick in 2023 (Table 16).

Taking the 2015 average spend per overseas tourist trip of €394.78, this would result in a 47.7% increase in revenue growth by 2023 using 2015 as the base year growing from €212.0 million in 2015 to €313.2 million in 2023 (Table 17).

2015	2016	2017	2018	2019	2020	2021	2022	2023
537,000	563,850	592,042	621,644	652,726	685,363	719,631	755,612	793,393

Table 16 Target Overseas Visitor Numbers to 2023

Year	Visitor Numbers	Revenue (€)
2015	537,000	212.0 million
2016	563,850	222.6 million
2017	592,042	233.7 million
2018	621,644	245.4 million
2019	652,726	257.7 million
2020	685,363	270.6 million
2021	719,631	284.1 million
2022	755,612	298.3 million
2023	793,393	313.2 million

Table 17 Target Overseas Visitor Numbers and Associated Target Revenue Growth



²⁴ According to the Fáilte Ireland Tourism Barometer – April 2017, tourism enterprises across the State are generally optimistic, with 60% expecting business to be ahead of 2016 and a further 29% expecting it to stay the same.

Targets for the domestic visitor market to the year 2023

Using a 5% year on year growth rate over a 7-year period starting from 2015, there would be in the region of 380,000 domestic visitors to Limerick by 2023 (Table 18).

2015	2016	2017	2018	2019	2020	2021	2022	2023
257,000	269,850	283,342	297,509	312,385	328,004	344,404	361,624	379,706

Table 18 Target Domestic Visitor Numbers to 2023

Target revenue growth for the domestic market based on the average spend during a trip taken by Irish resident in 2015 of €125.00 and applying visitor number targets to 2023, are set out below (Table 19). This would see an increase of €15.3 million during this eight-year period.

Combined Target (Overseas and Domestic Visitors)

With target numbers combined for overseas and domestic visitors, the potential revenue gain from the tourism sector in Limerick in 2023 is €360.6 million (Table 20).

Potential Job Creation

With the increase in total tourism revenue of €116.5 million by 2023 (based on the 2015 figure of €244 million), over 3,000 new jobs could potentially be supported in the **tourism related-sector**. This is based on Fáilte Ireland's estimate which determines that every €1 million worth of tourism expenditure supports 29 tourism jobs. **A conservative and achievable jobs target figure of 1,500 additional jobs generated by tourism activity is envisaged during the strategy period up to 2023.**

Year	Visitor Numbers	Revenue (€)	Year	Visitor Numbers	Revenue (€)
2015	257,000	32.1 million	2015	796,015	244.1 million
2016	269,850	33.7 million	2016	835,716	256.3 million
2017	283,342	35.4 million	2017	877,401	269.1 million
2018	297,509	37.2 million	2018	921,171	282.6 million
2019	312,385	39.0 million	2019	967,130	296.7 million
2020	328,004	41.0 million	2020	1,015,387	311.5 million
2021	344,404	43.0 million	2021	1,066,056	327.1 million
2022	361,624	45.2 million	2022	1,119,258	343.5 million
2023	379,706	47.4 million	2023	1,175,122	360.6 million

Table 19 Target Domestic Visitor Numbers and Associated Target Revenue Growth

Table 20 Total Visitor Number and Revenue Target (incorporating Overseas and Domestic Visitors)

up to **1,500**
new jobs



4.0 Unlocking the potential

4.1 OVERVIEW

The review of current performance and growth areas described throughout Section 3.3, the wide-ranging consultation process, the importance of a place centred or visitor economy approach, the target audiences/consumers segments listed above and the vision and objectives for tourism in Limerick have been instrumental in defining an appropriate strategic direction to guide the sector to 2023. The strategic framework for tourism is based around four key drivers which are broad enough in scope to appeal to the key audiences identified earlier, and which also provide a solid foundation in terms of the attributes and assets of the destination on which to build – such as **waterways**, **activities**, **heritage**, and **arts and culture** in both an urban as well as a rural environment. The strategic response in terms of the product offering that best fit the motivational drivers of Limerick's key target markets are presented below in the form of four key themes. Actions proposed for each theme are presented in Section 4.2 below. Coordinating structures and important organisational elements required to deliver on the actions are described in Section 5.0.

THEME 1: INTO THE BLUE

- A Shannon estuary location with a network of rivers and lakes throughout the county
- Opportunity to develop Limerick's blueways, facilitate greater access to waterways and link in with greenways
- Responds to the "Great Escapers": consumer segment

THEME 2: ENERGY UNLEASHED

- Strong base throughout Limerick
- Existing attractions among the most popular in Limerick (e.g. Ballyhoura Mountain Bike Trails)
- Responds to the "Social Energisers" consumer segment
- Significant untapped potential for adventure sports tourism and building on Limerick's reputation for sporting excellence

THEME 3: MEDIEVAL STRONGHOLDS

- Strong base throughout Limerick
- Existing attractions among the most popular in Limerick (e.g. the Hunt Museum, King John's Castle, Desmond Banqueting Hall)
- Responds to the "Culturally Curious" consumer segment
- Likely to appeal to US market
- Heritage led tourism traditionally strong performer

THEME 4: ALIVE AND KICKING

- Taps into Limerick's vibrant art and culture scene
- Existing attractions performing well - Foynes Flying Boat Museum, Limerick City Gallery of Art, Limerick City Museum
- Responds not only to the "Culturally Curious" consumer segment but also to aspects of the Social Energiser segment, especially those interested in a contemporary urban culture experience
- Likely to appeal to a European market – the French market in particular.



4.2 FOUR KEY DRIVERS

This tourism strategy identifies four areas that are central to driving forward the vision for tourism in Limerick. These are: waterways, activities, heritage and arts and culture. These areas are broad enough in scope to appeal to all of the potential visitor groups highlighted earlier.

The potential of these areas is put forward in thematic experience areas: Into the Blue (waterways), Energy Unleashed (activities), Medieval Strongholds (heritage), Alive and Kicking (arts and culture). The four multifaceted themes selected have been chosen on careful consideration of the consultation

outcomes, and baseline situation in terms of current offer, performance and potential of the sector, as described earlier. All themes incorporate a combination of person centred and place centred actions designed to ensure a holistic approach to optimising the potential of each theme.





THEME 1 - INTO THE BLUE

The position of Limerick City at the point where Ireland's longest river, the Shannon, meets the sea is one of its greatest natural assets. Furthermore, the canals and rivers that meander through the county, such as the Mulcair, Maigue, Abbey River, River Feal, Aherlow River and the River Deel, offer some of the county's best recreational opportunities and provide a majestic backdrop to Limerick's towns and villages, and to the network of trails and walkways located throughout the county. The sense that the potential of Limerick's waterways for tourism and recreational purposes was not being fully realised is something that came out strongly as part of the extensive consultation process undertaken in the strategy making process. Into the Blue seeks to create new opportunities to engage with the City and County's waterways and to appeal to the Great Escapers consumer segment. Key action areas to support this are presented in the actions visual and table below and overleaf.

Action Areas

1.0 Waterside Destinations

- 1.1 Initiate the development of a Blueways Masterplan. This will set in place a framework to prioritise infrastructural upgrades, create safe moorings points, enable higher levels of recreational use, open-up navigational possibilities, enhance accessibility, and help to develop waterside destinations supported by riverside walks and cycleways. Refer to case study examples set out in Appendix 3 including the regeneration of Liverpool's Albert Dock as a tourism destination and the Shannon Blueway.

2.0 Journey and Explore

- 2.1 Liaise closely with Fáilte Ireland on Limerick's position in the forthcoming Wild Atlantic Way Zone - capturing visitor flow to WAW by ensuring a compelling tourism offering that adds another dimension to the experience of the Wild Atlantic Way and establishes Limerick as a key destination in the forthcoming Wild Atlantic Way Zone.
- 2.2 Work with tourism providers to develop iconic itineraries on water e.g. from the City to Ard na Crusha, City to Lough Derg, Shannon Estuary Way, the Shannon Pilgrim Way etc., and highlight key sites/areas of cultural, archaeological, spiritual and natural heritage significance along or in close proximity to waterways (stop-off points) e.g. well-being experiences drawing on the associations of Celtic mysticism, initiatives such as the Dark Skies programme, forest bathing, contemplative walks etc. Refer to case study examples set out in Appendix 3 on the regeneration of Liverpool's Albert Dock as a tourism destination and the Shannon Blueway.

3.0 Celebrate and Showcase

- 3.1 Develop a coordinated programme of events and festivals to showcase city and county waterways focusing on:
- the maritime and industrial heritage including for example traditional boat building working with local actors such as Limerick City Build, Limerick Open Navigation Group, Ilen School, Viking history etc.
 - Competitive events and spectacles e.g. Tall Ships festival
 - Provenance and quality of seafood and freshwater catch
- 3.2 Package water based attractions in Limerick (boating, sailing, kayaking, fishing etc.) with other themed attractions (Medieval Strongholds, Alive and Kicking etc.) and festivals/ events.
- 3.3 Explore the possibility of Limerick City and County Council partnering with Waterways Ireland and neighbouring local authorities e.g. Clare, on an EU project on blueways (improving connectivity and facilitating movement between Lough Derg and the Shannon Estuary).



THEME 2 – ENERGY UNLEASHED

Limerick is famous for its sporting prowess with rugby in particular a major draw for international and domestic sports visitors. While the city is home to some of the best sports venues in the country, and is the location for a new rugby museum, Engage Rugby Experience, opportunities to ‘get active’ are available all around the county with world class mountain biking trails, walks, trails and outdoor pursuits on offer. Energy Unleashed proposes several key action areas to consolidate and optimise the sporting and adventure opportunities throughout Limerick. The actions recommended to develop the offer in this area are designed to strengthen Limerick's appeal to the Social Energisers consumer segment.

Action Areas

1.0 Epic Itineraries

- 1.1 Complete the development of the Great Southern Greenway Limerick as part of a broader ‘Epic Itineraries’ initiative that focuses on:
- ensuring places of interest along the way are geared up to welcome cyclists and walkers;
 - support the implementation of key enabling projects;
 - ensuring that the existing and emerging network of walking routes is well connected (supported by a navigation and signage strategy);
 - Develop off the beaten track paths and trails and fill in the gaps in the cross county off-road focusing on cycling and walking;
 - Strengthening connectivity to villages, towns and points of interest;
 - Linking in with the recently launched ‘Munster Vales’ brand focusing initially on the Ballyhoura region with a longer term view to line in with west Limerick and connecting with the Great Southern Greenway Limerick.
- Refer to case study example provided in Appendix 3 on the Great Western Greenway.
- 1.2 Develop and build on Limerick's growing reputation for adventure sports tourism – e.g. sea to mountain adventure event and expedition racing involving navigation over an unmarked wilderness route.

- 1.3 Explore the scope for sporting institutions and organisations such as the GAA to contribute to tourism development in the county and to promote sport as a valuable offer to the visitor experience.

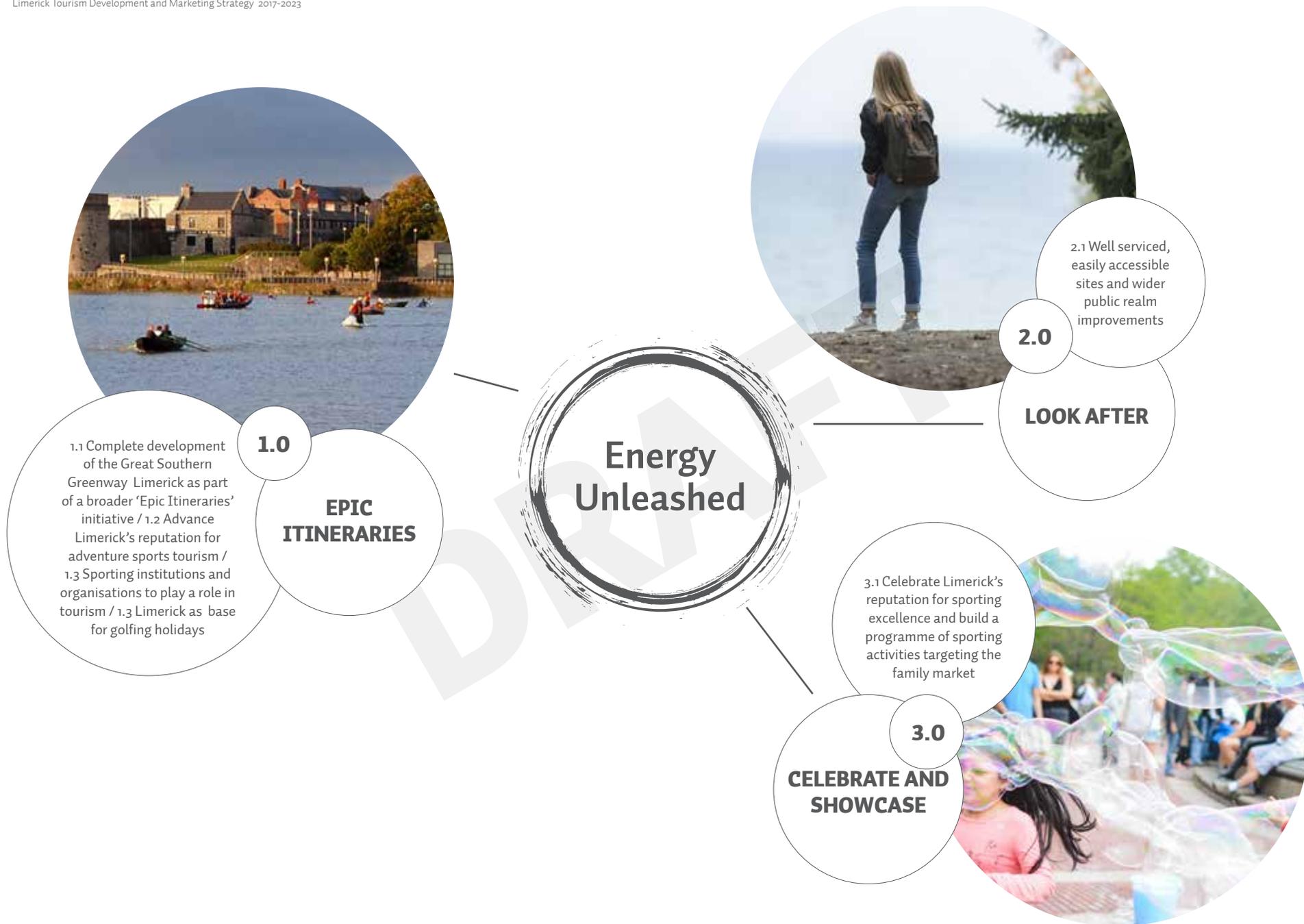
- 1.4 Work with actors involved in the local golfing industry to firmly establish Limerick as a base for golfing holidays in the Mid-West Region including liaison with relevant partners in Clare, Tipperary and Kerry.

2.0 Look After

- 2.1 Ensure all sporting and recreation sites are well serviced and easily accessible and that wider public realm improvements are delivered in support of new projects such as the International Rugby Museum

3.0 Celebrate and Showcase

- 3.1 Celebrate Limerick's reputation for sporting excellence through the hosting of international teams, the provision of training bases (linking in with the efforts to establish a National Sports Cluster as part of the Limerick 2030 Plan) and by building a programme of sporting activities to include provision for the family market and to coincide with the rugby calendar of events and the opening of the International Rugby Museum.



THEME 3 – MEDIEVAL STRONGHOLDS

Strengthening the tourism offering around the medieval heritage sites located throughout Limerick emerged as a high priority action for many stakeholders engaged with as part of the consultation process for this strategy.

Limerick has an abundance of important medieval sites for which different plans designed to safeguard the integrity of these assets and promote them as attractions, are already in place (these include provisions contained in Local Area Plans, Architectural Conservation Areas, Conservation Management Plans etc). The medieval strongholds theme adopts the place centred concept for a strong visitor economy. This focuses on building the tourism offer of the towns and villages in which significant medieval heritage sites are located so that they have a stronger appeal to the 'culturally curious' tourist and encourage them to stop and stay a while. In this regard, these towns and villages must play a vital role in orientating visitors and in the provision of services that meet the needs and expectations of visitors in terms of a wider package of things to see, do and enjoy. The medieval strongholds theme emphasises the importance of towns and villages as heritage hubs both in their own right, and as pointers to places of interest within the wider area. The theme of medieval strongholds identifies four networked clusters of medieval strongholds, as follows:

1. LIMERICK'S MEDIEVAL CORE

LIMERICK CITY

Highlights include the King's Island Medieval Core including King Johns Castle, St. Mary's Cathedral, and Nicholas Street, remains of Limerick City Walls, Early Christian monastery at Mungret, Treaty Stone.

2. LIMERICK'S CONNECTED HEARTLAND

THE MEDIEVAL STRONGHOLDS OF ABBEYFEALE, NEWCASTLE WEST, RATHKEALE AND ADARE

Highlights include Desmond Castle and Banqueting Hall, home of the Ardagh Chalice near Newcastle West, Glenquin Castle, De Lacy Castle, Ballingarry, the Augustinian Abbey at Rathkeale, and in Adare, Desmond Castle, Augustinian Friary, the Trinitarian Abbey founded in c.1230, the Franciscan friary, and Adare Methodist church graveyards.

3. FOUNDATIONS & FRONTIERS

LOUGH GUR, KILMALLOCK, KILFINANE, BRUFF, BRUREE

Highlights include the following:

Kilmallock:

Medieval town wall still intact, merchant's houses, 13th century Collegiate Church and the Dominican Priory, 15th century Blossom Gate, the Famine Memorial Park, Kilmallock museum, guided tour of the heritage trail

Lough Gur:

Heritage Centre, stone forts and circles including the internationally significant Grange Stone Circle, and the enclosed habitation site on Knockadoon, megalithic tombs known as the 'Giants Grave' and early Christian sites at Carraig Aille and the crannog at Bolin Islands

Bruff:

Thomas Fitzgerald Centre, Old Irish Ways Museum

Bruree:

Ruins of a De Lacy Castle, ring forts, de Valera Museum and Heritage centre

4. SHANNON STRONGHOLDS

GLIN, ASKEATON, MUNGRET

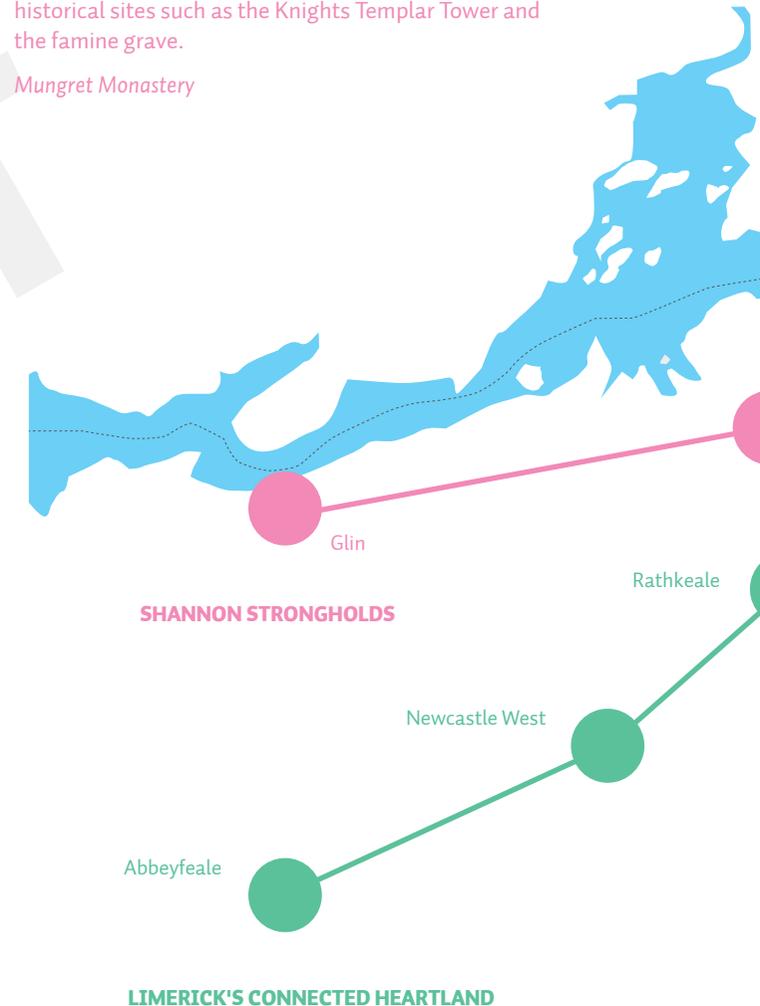
Glin village:

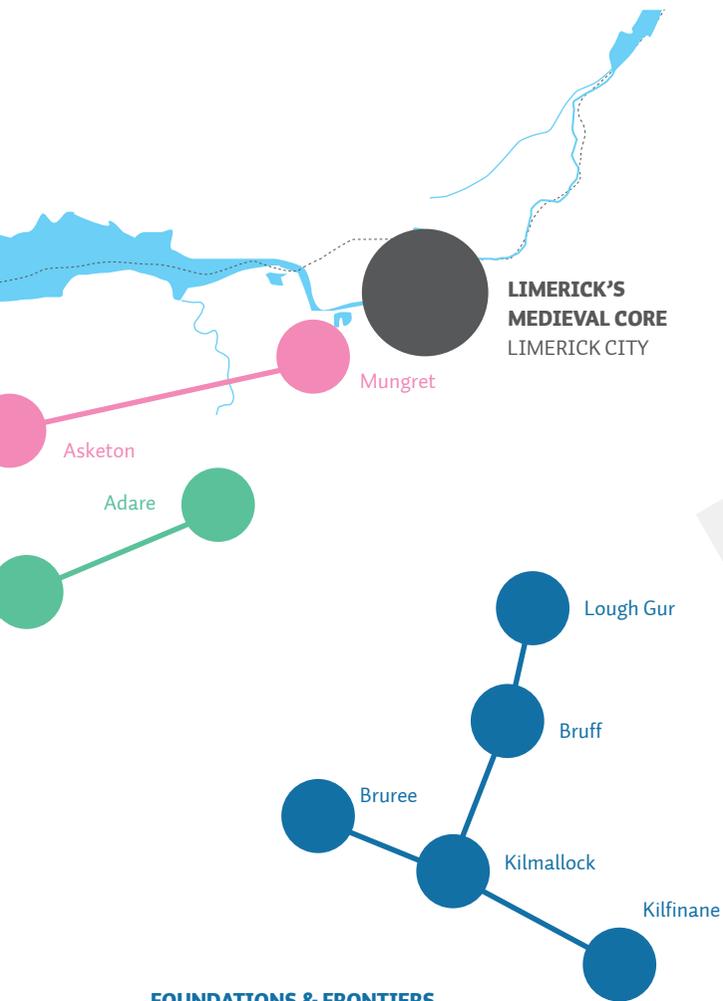
Ancestral home of the Knights of Glin and Glin Castle

Askeaton:

Castle Desmond on a rocky island in the middle of town, medieval Franciscan Friary, the Hell Fire Club and other historical sites such as the Knights Templar Tower and the famine grave.

Mungret Monastery





Action Areas

1.0 Celebrate and Showcase

- 1.1 Be dynamic in the use of heritage venues - audit existing venues to assess opportunities to adapt the space for different types of uses and immersive interactive events that make best use of the setting to tell the heritage story.
- 1.2 Make heritage venues more accessible to visitors by:
 - Extending the opening hours and number of open days for heritage venues and supporting a more active presence at significant heritage sites (include the participation of local heritage groups in organising guided walking tours etc.).
 - Creating discounted networked heritage cluster packages – explore the feasibility of introducing a heritage leap card for discounts on entry to attractions around the county.
 - Improving the visitor experience offered by existing medieval heritage centres/museums – tell the heritage story, drawing the visitor back in time through immersive interactive experiences.

2.0 Focus on the whole experience

- 2.1 Encourage the visitor to stop and stay - building on existing plans, service the hospitality needs of visitors through the provision of restaurants, cafes, pubs and accommodation and support visitors in moving around the networked heritage clusters through the provision of thematic sign posting.
- 2.2 Consider the feasibility of a Medieval Quarter in Limerick City and other key locations within the heritage clusters.

3.0 Collaborate to Thrive

- 3.1 Build awareness of the significance of the medieval heritage as a resource for tourism and work with communities to:
 - equip local people with the knowledge to support them in acting as local ambassadors (refer also to Section 6.0 Gearing Up and Delivery),
 - support groups such as Tidy Towns in local area enhancement initiatives and creating attractive settings in line with the ambition for tourism.
- 3.2 Learn from good practice exemplars in heritage led tourism (refer to Appendix 3 case study), and draw inspiration from initiatives such as the Irish Walled Town Networks and advance plans to establish a twinning programme between heritage towns e.g. Kilmallock with the walled town of Niedernhall, Germany.
- 3.3 Facilitate collaborative working between each of the four heritage clusters by:
 - Building on the many existing sources of information available on medieval heritage throughout the county, profile and consolidate Limerick's medieval heritage via promotion and branding of the four networked heritage clusters
 - Implementing a navigation and signage strategy to align with emerging interconnected network of paths/trails.
 - Scheduling a programme of linked events to take place within key heritage hubs of the four networked clusters.

Medieval Strongholds

FOUR NETWORKED CLUSTER



1.1 Be dynamic in the use of heritage venues and create immersive interactive experiences / 1.2 Make heritage venues more accessible extending opening hours/days and creating discounted packages

1.0

CELEBRATE AND SHOWCASE



2.1 Encourage visitors to stop and stay - thematic signage for places to eat, enjoy and stay. / 2.2 Feasibility study for Medieval Quarter

2.0

FOCUS ON THE WHOLE EXPERIENCE



3.0

3.1 Increase local recognition of medieval heritage / 3.2 Learn from good practice exemplars / 3.3 Facilitate collaborative working between each of the four heritage clusters

COLLABORATE TO THRIVE

THEME 4 – ALIVE AND KICKING

Limerick's personality is captured most creatively by the diverse cultural scene active throughout the city and county. Musicians, artists, designers, makers and writers have made Limerick their home adding a rich vibrancy to daily life, enlivening communities, and greatly contributing to Limerick's burgeoning reputation as an exciting and dynamic place to live, work and visit. 'Alive and Kicking' is designed to harness all that is great about traditional and contemporary culture in Limerick and make this more accessible to tourists. As well as arts, music, drama and literature, it also extends to the restaurant and culinary scene in Limerick, and the many cultural production activities that take place here. Efforts in this area will have a broad appeal but will be particularly helpful in targeting the 'social energisers' consumer segment.

1.0 Vital Venues

- 1.1 Advance proposals for a multi-purpose events / conferencing centre in Limerick City (refer to case study examples from London and Strasbourg, as set out in Appendix 3).
- 1.2 Realise the potential of fixed venues to diversify and adapt to different uses and events e.g. more family focused events at the Milk Market, the Hunt Museum and Limerick City Gallery of Art to show more exhibitions and be supported in their applications for funding to compete for internationally renowned exhibitions. Refer to the Holazmarkt case study example in Berlin, Germany (Appendix 3).
- 1.3 Create more vibrant streetscapes by encouraging public displays of creative expression in designated creative hubs located throughout Limerick. Increase the visibility of art in public spaces and make available for public use an image bank of photographs.
- 1.4 Review existing Council run tourism infrastructure with a view to optimising their tourism potential; e.g. Adare Heritage Centre, Lough Gur, Great Southern Greenway.

2.0 Celebrate and Showcase

- 2.1 Showcase Limerick's heritage venues by working with cultural stakeholders to create evocative theatrical and musical

experiences such as the Son et Lumiere music and light shows that have previously been held in St. Mary's Cathedral and King Johns Castle and take on a more active promotion of musical events in atmospheric or unusual venues. Promote and enhance accessibility to authentic experiences that allow the visitor to directly engage with local people and hold more spontaneous pop-up events in collaboration with cultural groups and events management organisations (performance art, outdoor cinema, music events, proms in the park, picnics, fitness and sports related events etc.).

- 2.2 Continue to work with event organisers including sporting and arts venues to offer an exciting and diverse calendar of year-round events that have a broad appeal attractive to both visitors and local people.

3.0 Made in Limerick

- 3.1 Investigate the feasibility of a Made in Limerick retail store to be situated in Limerick City providing an official outlet for high quality craft goods, fashion and food produced in Limerick. In support of this:
 - Tap into the talent and skills of Limerick's crafts people e.g. work with lace makers and the Limerick Museum to continue to raise the profile of Limerick Lace and to extend the tutorial series with master lace makers. These could be combined with jewellery and glass making workshops in venues across the city and county such as Ormiston House – Cultural Resource Centre.
 - Work with Limerick designers, design colleges and retailers to showcase Limerick fashion and millinery through ongoing promotion of the 'Made in Limerick' branding programme.
- 3.2 Provide memorable food experiences for visitors by encouraging a greater uptake and use of local artisan products in pubs, cafes, restaurants and hotels, and create visitor experiences that showcase Limerick's food provenance in unique settings (e.g. Downton Abbey style culinary experiences at the Milk Market and Georgian Limerick, waterside fishing/dining experience). Advance measures recommended in the Food Strategy for Limerick 2016-2018 to promote the Golden Vale as a potential food brand for Limerick

4.0 Lights, Camera, Action

- 4.1 In collaboration with the Irish Film Institute, Troy Studios and

other relevant stakeholders, continue to promote and market Limerick as a location to international film production companies. Commission a short film series celebrating all the places, attractions and people that make Limerick special. To create a real impact across social and mainstream media channels, the film series must capture the passion and spirit of the county, the epic adventures that await, the creative energy of its people, and the spectacular sites that exist throughout the county in an emotive and breath-taking way.

5.0 After Dark

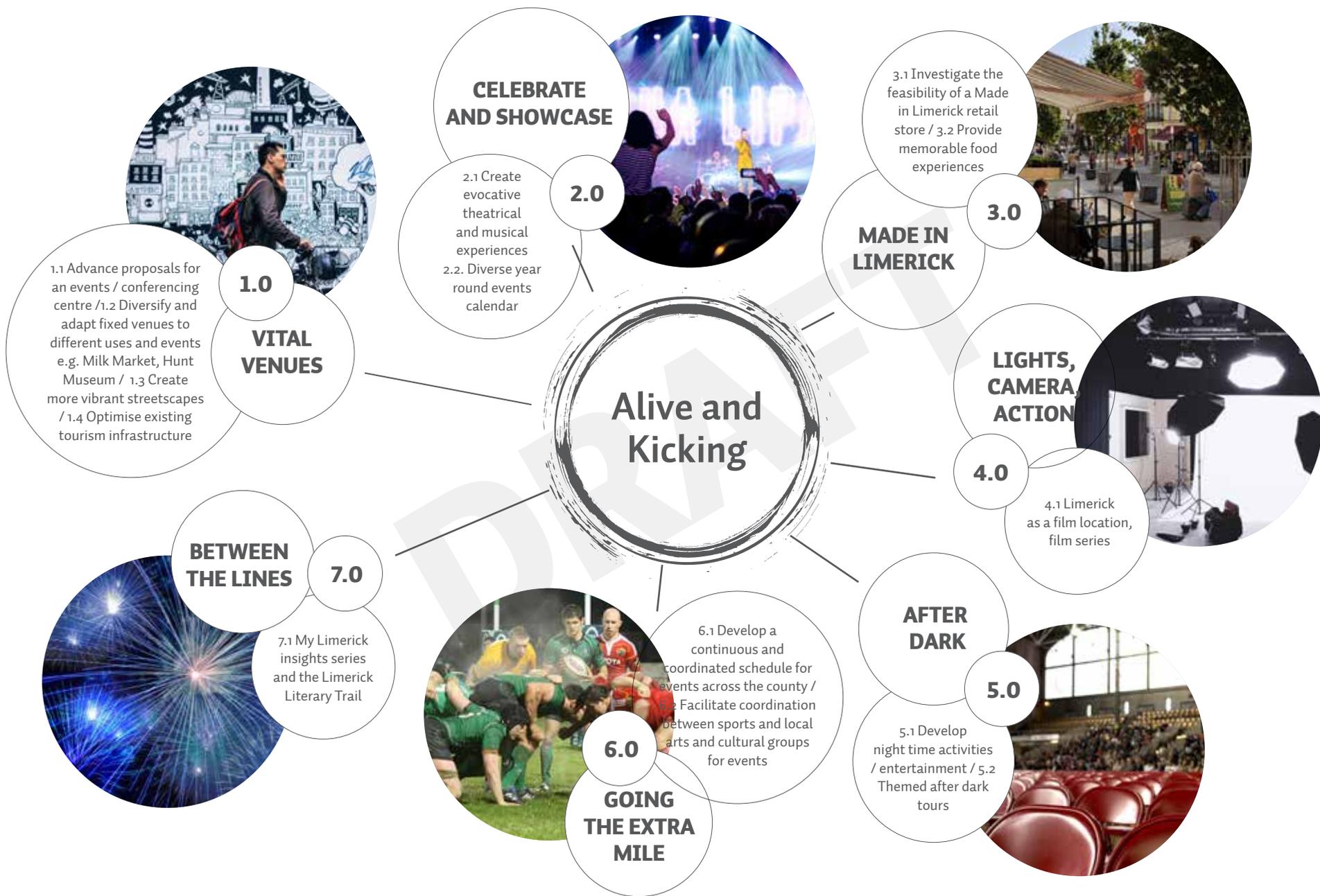
- 5.1 In coordination with the Street Charter movement proposed in 'Gearing Up', continue to develop night time activities to enliven Limerick City and its towns and villages during the evening, capitalising on Limerick's Purple Flag status. A key step in this would be to liaise with retailers, cafes and restaurants to extend their opening hours into the evening.
- 5.2 Atmospheric walking tours of Medieval Limerick touring King Johns Castle, St. Mary's Cathedral, the Treaty Stone, St. Munchin's church and grave. Themed after dark tours can be arranged in line with key holidays such as Halloween. Places such as St. Munchin's and King John's Castle provide the ideal setting for atmospheric visitor experiences such as the Spooktastic events at Halloween – this would involve the participation of local drama and theatre groups.

6.0 Going the Extra Mile

- 6.1 Develop a continuous and coordinated schedule for events throughout the year and set in place the necessary transport provisions so that visitors can conveniently move between urban and rural locations.
- 6.2 Facilitate coordination between sports and local arts and cultural groups so that follow up events and festivals are coordinated to take place around the city and county before and after match fixture weekends. Continue to liaise with relevant groups on a 'paint the town red' programme to dress the city in anticipation of and during major rugby events.

7.0 Reading Between the Lines

- 7.1 Invite contemporary Limerick writers and artists (e.g. Kevin Barry, Rubberbandits) to contribute to a "My Limerick" insights magazine or book series. Extend and develop an interpretation programme for a Limerick Literary Trail and take steps to promote Limerick's literary heritage such as 'Bring your limerick's to Limerick' poetry competition or festival.



5.0 Gearing up for Delivery

This section sets out the critical management, resource and infrastructural measures required to achieve the vision for tourism in Limerick and to support the planning and implementation of the thematic action areas set out in Section 4.0.

5.1 LEADERSHIP, COORDINATION AND COLLABORATION

Tourism is a multi-sectoral and challenging area that requires careful coordinating structures to ensure that all parties involved are supported in working effectively together to achieve the full potential of the sector. The Tourism Unit of Limerick City and County Council will act as the overarching coordination body for delivery of the vision for tourism in Limerick and for the strategic level management of the four thematic areas and the actions underpinning each theme. Immediate actions to take on adoption of this strategy are set out below:

1. Tourism Unit to convene a meeting with colleagues in the Communications and Marketing, Planning and Environmental Services, Heritage, Museums and Archaeology unit, Living Limerick and the Local Enterprise Office of Limerick City and County Council to discuss a collaborative approach to implementation of the thematic actions.
2. Meeting(s) should also be held with stakeholders introducing the thematic actions and to discuss roles and responsibilities across the thematic actions and to introduce the Tourism Forum concept (see point 3 below).
3. The Tourism Unit to establish a Tourism Forum to include tourism providers, stakeholders and volunteers from around Limerick. The public workshops carried out in support of this strategy highlighted the huge local support for tourism and the many activities and initiatives that are being undertaken by local development groups active throughout Limerick. The support and active participation of local groups is critical to the success of this Tourism Strategy. The overall purpose of the Forum is to ensure regular cross communication between the Tourism Unit and local

stakeholders. Members of the Tourism Forum should be invited to assist in the delivery of relevant thematic actions and will agree to work as advocates for tourism in the community. Furthermore, the Tourism unit should report to members of the Tourism Forum on progress in delivering the thematic action areas on a quarterly basis. Members of the Forum will be invited to sign a Street Charter (in the case of Limerick City), and a Towns Charter in the case of Limerick towns. The Street or Towns Charters will focus on public realm improvements, working with or alongside relevant volunteer groups such as Tidy Towns, and in alignment with any existing public realm plan or initiatives in place. In carrying out public realm improvements, there may also be an opportunity to recruit from the Community Employment Scheme.

4. Create a Tourism Charter to be signed by all public and private bodies allocated responsibility for delivery of actions set out under this strategy and in support of follow up plans and strategies.
5. The Tourism Unit to work with colleagues from other departments in Limerick City and County Council, and other stakeholders, to secure funding for capital investment projects and initiatives set out in this tourism strategy.
6. Work with local, regional and state partners in developing the information base on tourism numbers and spend to supplement current sources and to enable the establishment of a monitoring and evaluation framework for this Strategy (refer to Section 6.0).

Theme	Suggested Stakeholders
Theme 1: Into the Blue	Planning and Property, Festivals and Events Unit, Arts Office, Living Limerick, Local Enterprise Office - Limerick City and County Council, Waterways Ireland, Fáilte Ireland, Office of Public Works (OPW), Shannon Foynes Port Company, Cultural Institutions, Ilen School, Sail Training International, Water based activity providers, Lough Gur Development, Shannon Region Conference and Sports Bureau.
Theme 2: Energy Unleashed	Festivals and Events Unit, Arts Office, Limerick City and County Council, Irish Rugby Football Union, Munster Rugby, Board of Rugby Experience Museum, Limerick Sports Partnership (Irish Sports Council), GAA and other sporting institutions, Innovate Limerick, UL's sports campus, LIT's Sportslab, Fisheries Local Action Group, Shannon Region Conference and Sports Bureau, National Parks and Wildlife Service (NPWS), Irish Trails (Irish Sports Council), local development companies (Ballyhoura Development, West Limerick Resources etc.), DTTAS, Smarter Travel, Private operators (sports/ adventure companies), The IGTOA Ireland Golf Tour Operator Association, Golf Resort operators (hoteliers etc.), Clare, Kerry and Tipperary County Councils.
Theme 3: Medieval Strongholds	Festivals and Events Unit, Arts Office, Heritage and Archaeology, Architecture, Planning and Property -Limerick City and County Council, Limerick Civic Trust, OPW, Department of Arts, Heritage Regional, Rural and Gaeltacht Affairs, Private Operators, Waterways Ireland, Shannon Foynes Port Company, local branches of Tidy Towns, Ballyhoura Development, West Limerick Resources, Lough Gur Development, Local heritage groups and historical societies, Shannon Region Conference and Sports Bureau.
Theme 4: Alive and Kicking	Festivals and Events Unit, Arts Office, Heritage and Archaeology, Planning and Property - Limerick City and County Council, OPW, Department of Arts, Heritage Regional, Rural and Gaeltacht Affairs, Private Operators, Innovate Limerick, Music Generation Limerick, Irish Chamber Orchestra, organisers of music festivals such as Limerick Pipe Organ Festival/, Limerick Jazz Festival Organisers, Fleadh by the Feale Traditional Music Festival, Crafts Council of Ireland, Limerick Lace, Limerick Printmakers, venue owners, Limerick clothing retailers, LIT School or Art and Design, Hotel groups, Farmers Markets, local food producers, Limerick Arts and Cultural Exchange (LACE), Irish Film Institute, Troy Studios, local film makers, Shannon Region Conference and Sports Bureau, Limerick Chamber, Restaurants and Retailers, Civic Trust, Music, Theatre and Drama Groups, Limerick Sports Partnership, Limerick Youth Theatre, Foroige and other youth clubs, Irish Rugby Football Union, Munster Rugby, local writers, poets, musicians, local craftspeople and artists, organisers of literary events/festivals

7. Partner with Shannon Region Conference and Sports Bureau, Limerick Chamber and other relevant groups to develop the business tourism sector in Limerick.
8. Work with tourism providers, service industry professionals, and education providers such as the Limerick and Clare Education and Training Board (LCETB) and the Limerick College of Further Education (LCFE) to devise a free tourism training course with modules on customer service and local heritage (in line with Medieval Stronghold Action no. 3.1 and 3.2).
9. Encourage tourism providers and business owners in the service and hospitality to register their business with Fáilte Ireland.
10. Building awareness and local knowledge of the tourism assets within the city, towns and villages of Limerick is a key element that is reflected across many of the action areas. To support this, the Tourism Unit should facilitate tourism providers across the county in learning more about other tourism attractions that are complementary to their facility or service. Free visits and travel to tourism attractions throughout the county should be arranged on a quarterly basis to facilitate a peer to peer or expert to expert collaboration network.
11. The Tourism Unit to maintain an oversight role on events taking place across the thematic experience areas, and to encourage the scheduling and effective coordination of events. As part of this the Tourism Unit should support the implementation of recommendations set out in the 'Let's Talk Festivals' report on establishing a Framework for Limerick Festivals and Events. The Arts Office of LCCC plays a central role in development of the sector. It will be crucial to ensure the direct involvement of a Festivals and Events Unit within the Arts Office to oversee festivals and events and in delivering the 'celebrate and showcase' action areas set out in the four thematic areas. The Festivals and Events Unit should also facilitate the sharing of expertise between established and developing events by the Tourism Unit and other stakeholders on event/festival planning and coordination, and organisers on critical aspects such as funding, grant schemes and insurance.

In the longer term, it is recommended that a Destination Management Taskforce (DMT) is established as the overarching coordinating body for tourism in Limerick. This taskforce should be led by a fully staffed department within Limerick City and County Council (LCCC) as an extension of the Tourism Unit.

Building awareness and local knowledge of the tourism assets within the city, towns and villages of Limerick is a key element that is reflected across many of the action areas.





5.2 MAKING VITAL CONNECTIONS

Multi-partner coordination is critical to ensure the delivery of an integrated strategy that addresses the myriad of issues that must be addressed in growing the tourism industry in Limerick. This section sets out actions focused on building vital connections with departments and agencies that have a vital supporting role to play in enhancing the visitor economy in Limerick and the successful delivery of this Strategy. It also has several actions related to strengthening the physical linkages between places and attractions.

- It is critical to recognise and embrace the opportunities to exploit Limerick's strategic position as the 'gateway' to the Wild Atlantic Way. A huge opportunity for Limerick to intercept visitors to the WAW and encourage them to explore the City and County exists with Fáilte Ireland's forthcoming plan to introduce a Wild Atlantic Way Zone. A critical role for the Tourism Unit following the immediate adoption of this Strategy will be to liaise closely with Fáilte Ireland on ensuring Limerick is fully geared up and ready to respond to its new role within the WAW Zone and the new touring route off the WAW, the Shannon Estuary Way.
- Enhance coordination between LCCC departments to address fundamental issues central to creating and ensuring that Limerick towns, villages and City are maintained as attractive places that people will want to visit and enjoy. These issues include street cleaning, safety and security issues, coach parking, bus connections. In this regard, it will be critical for the Tourism Unit to support and liaise with relevant departments on the implementation of initiatives proposed as part of the City, County or Local Area Plans including Public Realm plans, Town Improvement Schemes, Living Limerick Initiative, Smart Travel initiatives etc.
- Advance plans set out in the Limerick 2030: Economic and Spatial Plan for Limerick to prioritise pedestrians in city centre areas such as O'Connell Street and consider the pedestrianisation of city centre streets.
- Continue to work closely with the Shannon Region Conference and Sports Bureau on further developing the business and leisure or 'bleisure' industry in Limerick, and in supporting essential development projects necessary to grow the conference/events sector in Limerick such as a major events centre as part of the Cleaves Riverside Campus development. An important element will be to liaise with the Shannon Region Conference and Sports Bureau and other agencies in developing the wider tourism offering as envisaged under the thematic actions so that business professionals are enticed to extend their stay and travel around the county.
- Liaise with disability groups in preparing navigation and signage strategies and in undertaking measures to support mobility of visitors around the county.
- Liaise with tourism providers within the city and throughout the county in creating discounted packages to attractions. Consider the formulation of packages that are based and branded on attractions associated with the 4 thematic experiences set out in this strategy: Into the Blue, Energy Unleashed, Medieval Strongholds and Alive and Kicking. Leap packages and combination packages encouraging a visitor to diversify their visit to the county both in terms of thematic experience and spatially (moving from urban to rural settings) – (linked with Theme 3 Medieval Strongholds Action 1.2).
- Explore the possibility of partnering with hoteliers and other accommodation providers in rolling out the discounted packages scheme. Packages could be promoted online as part of the reservations/booking system. Possible direct purchasing options include the installation of ticket machines in hotels, direct purchase from concierge / reception.
- Coordinate the delivery of a consistent navigation and signage strategy at key arrival points to enhance connectivity and accessibility to and between key sights of interest (Shannon Airport, Colbert Railway Station, road network, Foynes).
- To enhance the presence of Limerick at key arrival points particularly Shannon Airport through which 1.74 million people passed through in 2016.

5.3 MARKETING AND BRANDING

The Tourism Unit should work alongside the Communications and Marketing Department of Limerick City and County Council to implement a new marketing strategy for Limerick's proposition – the four thematic experiences set out in Section 4.0. The marketing strategy will work to enhance awareness of the visitor experiences on offer across Limerick, and to create a seamless marketing campaign to reflect this. Key actions in this regard are as follows:

- Content Curation – A project that will focus on content sourcing, curation and communication to provide the images, storylines, etc. to substantiate the brand, feed into marketing campaigns and begin the process of re-imagining and re-positioning Limerick as a destination.

1. Curate Compelling Content

- Content has to have a strong local voice
- It can be suggested by local people
- It should include edginess and fascinating contrasts
- It should speak to Limerick's reputation as well as its assets
- It should focus on central ideas that resonate with the thematic framework
- It needs great visualisation
- It needs perfect soundbites
- It needs to be bite sized

2. Invite Visitors to Come on Our Journey

- Celebrate the role of the local citizen
- Invite visitors to step into our shoes rent someone's home, explore real neighbourhoods, experience the vibrant reality, go deeper, go further, at your pace, under your own steam
- Be ourselves
- Invite visitors to be themselves

3. Make Others Tell Our Story

- Invest in PR and social media influencer work
- Recognise that digital is never done
- It's all about mobile platforms
- It has to be responsive
- Trust others to carry the conversation forward
- Be ever-present, listen, respond, expand

4. Recognise that You Can't Please Everybody

- Recognise that audiences evolve
- Don't think end-state, think a forever prototype
- Experiment, tweak, re-create
- Opt for creativity, boldness, agility

5. Collaborate to Compete

- Trust in collaborative projects
- Trust in common messaging

- Consult with members of the Tourism Forum that are part of an established and branded tourism region within Limerick on the possibilities to adopt a united brand for tourism across the city and county (offering flexibility to promote the Limerick tourism brand).

- Invest in digital assets and advertising platforms such as the ihubbs solar powered units used in Dublin which support the brand.

- Bring brand to life through social media amplifying the voice of visitors, residents and industry as advocates for the Limerick tourism experience. This is linked to thematic actions set out under the Medieval Strongholds theme – Actions 3.1 and 3.2 which focus on building an awareness and appreciation of local heritage assets. It also seeks to tap into the currency of pride of place – and ensuring that the distinct personality and character of Limerick people and communities, is communicated to visitors and potential visitors through viral video content and advertising mechanisms (refer to Action 4.1 of Alive and Kicking on creating an Epic Limerick video series). Also pursue more traditional marketing channels in promoting Limerick as a tourism destination – for example continue to showcase Limerick at Trade Shows and advertise in international travel publications.

- Work with strategic tourism partners and industry representatives to target those markets and segments that best align with Limerick’s strengths (referencing the key audiences set out in Section 3.3 of this Strategy), and represent strong potential for increased visitor numbers and value to the local economy.

- Work with Shannon Region Conference and Sports Bureau on developing content on business and leisure or ‘bleisure’ opportunities within Limerick City and County to be provided to Fáilte Ireland to form part of the ‘Meet in Ireland’ brand. ‘Meet in Ireland’ is the official MICE (Meetings, Incentives, Conferences and Events) brand to promote the island of Ireland as a world class business tourism destination.

The Tourism Unit and Events/Festivals Unit to liaise closely with Fáilte Ireland on promoting Limerick as the location for major events. The National Action Plan for Jobs 2017 sets a target for Fáilte Ireland to secure a minimum of four new events for Ireland, in particular sporting events, (generating an estimated €30 million in revenue).

- Promote rural-based tourism through online programmes which enable small businesses to more easily reach potential visitors.

- Draw on opportunities presented by existing twinning and international friendship arrangements to promote Limerick to key markets in these locations.

- Ensure tourism 'experiences' (e.g. walking tours, water sports activities), that feature local businesses, are readily available at the stage when people are booking their travel arrangements online. Collaborate with strategic partners to contribute to and create marketing campaigns to motivate visits from priority markets.



5.4 ROAD MAP FOR DELIVERY

A coordinated effort comprising the participation of multiple partners is required to ensure the successful implementation of the actions set out under each of the four themes. The lead organisation on each action is to be supported by other key actors, as indicated. Timeframes for delivery are also proposed.

Action Area No.	Theme 1 Into the Blue	Leader	Other Key Actors	Timeframes		
				Start Now: Quick Wins 1-2 year projects	Start Soon: 2-6 year projects	Slow Burn / Long Term Projects
1.0	Waterside Destinations					
1.1	Initiate the development of a Blueways Masterplan. This will set in place a framework to prioritise infrastructural upgrades, create safe moorings points, enable higher levels of recreational use, open-up navigational possibilities, enhance accessibility, and help to develop waterside destinations supported by riverside walks and cycleways.	Tourism Unit, Limerick City and County Council, Planning and Property, Living Limerick, Local Enterprise Office - Limerick City and County Council	Waterways Ireland, Limerick Arts Office, Cultural Institutions			
2.0	Journey and Explore					
2.1	Liaise closely with Fáilte Ireland on Limerick's position in the forthcoming Wild Atlantic Way Zone - capturing visitor flow to WAW by ensuring a compelling tourism offering that adds another dimension to the experience of the Wild Atlantic Way and establishes Limerick as a key destination in the forthcoming Wild Atlantic Way Zone.	Tourism Unit, Limerick City and County Council	Fáilte Ireland			
2.2	Work with tourism providers to develop iconic itineraries on water e.g. from the City to Ard na Crusha, City to Lough Derg, Shannon Estuary heritage walk, the Shannon Pilgrim Way etc., and highlight key sites/areas of cultural, archaeological, spiritual and natural heritage significance along or in close proximity to waterways (stop-off points) e.g. well-being experiences drawing on the associations of Celtic mysticism, initiatives such as the Dark Skies programme, forest bathing, contemplative walks etc.	Tourism Unit, Limerick City and County Council, Lough Gur Development, Archaeology - Limerick City and County Council	-Waterways Ireland, OPW			

Action Area No.	Theme 1 Into the Blue	Leader	Other Key Actors	Timeframes		
				Start Now: Quick Wins 1-2 year projects	Start Soon: 2-6 year projects	Slow Burn / Long Term Projects
3.0	Celebrate and Showcase					
3.1	Develop a coordinated programme of events and festivals to showcase city and county waterways focusing on: <ul style="list-style-type: none"> the maritime and industrial heritage including for example traditional boat building working with local actors such as Limerick City Build, Limerick Open Navigation Group, Ilen School, Viking history etc. Competitive events and spectacles e.g. Tall Ships festival Provenance and quality of seafood and freshwater catch 	Tourism Unit, Planning and Property and Economic Development, Festivals and Events Unit - Arts Office, Limerick City and County Council	Ilen School Sail Training International Local Enterprise Office (LEO), Food Tourism Development Network			
3.2	Package water based attractions in Limerick (boating, sailing, kayaking, fishing etc.) with other themed attractions (Medieval Strongholds, Alive and Kicking etc.) and festivals/ events.	Tourism Unit, Limerick City and County Council	Water based activity providers			
3.3	Explore the possibility of Limerick City and County Council partnering with Waterways Ireland and neighbouring local authorities e.g. Clare, on an EU project on blueways (improving connectivity and facilitating movement between Lough Derg and the Shannon Estuary)	Tourism Unit, Limerick City and County Council	Waterways Ireland, Clare County Council, Tipperary County Council			

Action Area No.	Theme 2 Energy Unleashed	Leader	Other Key Actors	Timeframes		
				Start Now: Quick Wins 1-2 year projects	Start Soon: 2-6 year projects	Slow Burn / Long Term Projects
1.0	Epic Itineraries					
1.1	<p>Complete the development of the Great Southern Greenway Limerick as part of a broader 'Epic Itineraries' initiative that focuses on:</p> <ul style="list-style-type: none"> ensuring places of interest along the way are geared up to welcome cyclists and walkers; support the implementation of key enabling projects; ensuring that the existing and emerging network of walking routes is well connected (supported by a navigation and signage strategy); Develop off the beaten track paths and trails and fill in the gaps in the cross county off-road focusing on cycling and walking; Strengthening connectivity to villages, towns and points of interest; Linking in with the recently launched 'Munster Vales' brand focusing initially on the Ballyhoura region with a longer term view to line in with west Limerick and connecting with the Great Southern Greenway Limerick. 	Tourism Unit, Limerick City and County Council	Kerry County Council, local development companies (Ballyhoura Development, West Limerick Resources etc.), DTTAS, Smarter Travel, Limerick Destination and Marketing Manager, Tipperary County Council			
1.2	Develop and build on Limerick's growing reputation for adventure sports tourism – e.g. sea to mountain adventure event and expedition racing involving navigation over an unmarked wilderness route.	Tourism Unit, Limerick City and County Council	Private operators (sports/adventures companies), Ballyhoura Development, Limerick Sports Partnership (Irish Sports Council)			
1.3	Explore the scope for sporting institutions and organisations such as the GAA to contribute to tourism development in the county and to promote sport as a valuable offer to the visitor experience.	Tourism Unit, Limerick City and County Council	GAA, Limerick Sports Partnership (Irish Sports Council)			

Action Area No.	Theme 2 Energy Unleashed	Leader	Other Key Actors	Timeframes		
				Start Now: Quick Wins 1-2 year projects	Start Soon: 2-6 year projects	Slow Burn / Long Term Projects
1.4	Work with actors involved in the local golfing industry to firmly establish Limerick as a base for golfing holidays in the Mid-West Region including liaison with relevant partners in Clare, Tipperary and Kerry.	Tourism Unit, Limerick City and County Council	The IGTOA Ireland Golf Tour Operator Association, Golf Resort operators (hoteliers etc.), Clare, Kerry and Tipperary County Council's.			
2.0	Look After					
2.1	Ensure all sporting and recreation sites are well serviced and easily accessible and that wider public realm improvements are delivered in support of new projects such as the International Rugby Museum	Tourism Unit, Limerick City and County Council, Board of Rugby Experience Museum, JP McManus Tourism Unit, Festivals and Events Unit - Arts Office, Limerick City and County Council	Limerick Sports Partnership (Irish Sports Council), Sporting Organisations, Private and State Operators of Sporting and Recreational Facilities Irish Rugby Football Union, Munster Rugby Irish Rugby Football Union, Munster Rugby, Board of Rugby Experience Museum, Limerick Sports Partnership (Irish Sports Council), GAA and other sporting institutions			
3.0	Celebrate and Showcase					
3.1	Celebrate Limerick's reputation for sporting excellence through the hosting of international teams, the provision of training bases (linking in with the efforts to establish a National Sports Cluster as part of the Limerick 2030 Plan) and by building a programme of sporting activities to include provision for the family market and to coincide with the rugby calendar of events and the opening of the International Rugby Museum.	Tourism Unit, Limerick City and County Council	Limerick Sports Partnership, Innovate Limerick, UL's sports campus, LIT's Sportslab			

Action Area No.	Theme 3 – Medieval Strongholds	Leader	Other Key Actors	Timeframes		
				Start Now: Quick Wins 1-2 year projects	Start Soon: 2-6 year projects	Slow Burn / Long Term Projects
1.0	Celebrate and Showcase					
1.1	Be dynamic in the use of heritage venues - audit existing venues to assess opportunities to adapt the space for different types of uses and immersive interactive events that make best use of the setting to tell the heritage story.	Tourism Unit Festivals and Events Unit - Arts Office, Heritage and Archaeology - Limerick City and County Council	OPW, Department of Arts, Heritage Regional, Rural and Gaeltacht Affairs, Private Operators			
1.2	Make heritage venues more accessible to visitors by: Extending the opening hours and number of open days for heritage venues and supporting a more active presence at significant heritage sites (include the participation of local heritage groups in organising guided walking tours etc.). Creating discounted networked heritage cluster packages – explore the feasibility of introducing a heritage leap card for discounts on entry to attractions around the county. Improving the visitor experience offered by existing medieval heritage centres/museums – tell the heritage story, drawing the visitor back in time through immersive interactive experiences.	Tourism Unit, Heritage, Museums and Archives - Limerick City and County Council	OPW, Private Operators, Hotels			
2.0	Focus on the whole experience					
2.1	Encourage the visitor to stop and stay - building on existing plans, service the hospitality needs of visitors through the provision of restaurants, cafes, pubs and accommodation and support visitors in moving around the networked heritage clusters through the provision of thematic sign posting.	Tourism Unit Limerick City and County Council, Planning and Property Limerick City and County Council	Private Operators			
2.2	Consider the feasibility of a Medieval Quarter in Limerick City and other key locations within the heritage clusters.	Tourism Unit Limerick City and County Council, Planning and Property Limerick City and County Council, Limerick Civic Trust	Shannon Group			

Action Area No.	Theme 3 – Medieval Strongholds	Leader	Other Key Actors	Timeframes		
				Start Now: Quick Wins 1-2 year projects	Start Soon: 2-6 year projects	Slow Burn / Long Term Projects
3.0	Collaborate to Thrive					
3.1	Build awareness of the significance of the medieval heritage as a resource for tourism and work with communities to: <ul style="list-style-type: none"> equip local people with the knowledge to support them in acting as local ambassadors (refer also to Section 6.0 Gearing Up and Delivery), support groups such as Tidy Towns in local area enhancement initiatives and creating attractive settings in line with the ambition for tourism. 	Tourism Unit, Heritage and Archaeology - Limerick City and County Council	Waterways Ireland, Shannon Group, Shannon Foynes Port Company, local branches of Tidy Towns			
3.2	Learn from good practice exemplars in heritage led tourism (refer to Appendix 3), and draw inspiration from initiatives such as the Irish Walled Town Networks and advance plans to establish a twinning programme between heritage towns e.g. Kilmallock with the walled town of Niedernhall, Germany.	Tourism Unit, Heritage and Archaeology - Limerick City and County Council	-			
3.3	Facilitate collaborative working between each of the four heritage clusters by: <ul style="list-style-type: none"> Building on the many existing sources of information available on medieval heritage throughout the county, profile and consolidate Limerick's medieval heritage via promotion and branding of the four networked heritage clusters Implementing a navigation and signage strategy to align with the emerging interconnected network of paths/trails. Scheduling a programme of linked events to take place within key heritage hubs of the four networked clusters. 	Tourism Unit, Heritage and Archaeology - Limerick City and County Council	Ballyhoura Development, West Limerick Resources, Lough Gur Development, Local heritage groups and historical societies			

Action Area No.	Theme 4 – Alive and Kicking	Leader	Other Key Actors	Timeframes		
				Start Now: Quick Wins 1-2 year projects	Start Soon: 2-6 year projects	Slow Burn / Long Term Projects
1.0	Vital Venues					
1.1	Advance proposals for a multi-purpose events / conferencing centre in Limerick City.	Tourism Unit, Museums and Archives - Limerick City and County Council	OPW, Department of Arts, Heritage Regional, Rural and Gaeltacht Affairs, Private Operators, Shannon Group			
1.2	Realise the potential of fixed venues to diversify and adapt to different uses and events e.g. more family focused events at the Milk Market, the Hunt Museum and Limerick City Gallery of Art to show more exhibitions and be supported in their applications for funding to compete for internationally renowned exhibitions.	Tourism Unit, Property and Planning - Limerick City and County Council	Innovate Limerick			
1.3	Create more vibrant streetscapes by encouraging public displays of creative expression in designated creative hubs located throughout Limerick. Increase the visibility of art in public spaces and make available for public use an image bank of photographs.	Tourism Unit, Arts Office - Limerick City and County Council	Limerick Arts and Cultural Exchange (LACE), LIT Limerick School or Art and Design, Local Art courses, local artists			
1.4	Review existing Council run tourism infrastructure with a view to optimising their tourism potential; e.g: Adare Heritage Centre, Lough Gur, Great Southern Greenway.	Tourism Unit, Property and Planning - Limerick City and County Council	Lough Gur Development Society, Adare Heritage centre, OPW, Waterways Ireland and other relevant stakeholders			
2.0	Celebrate and Showcase					
2.1	Showcase Limerick's heritage venues by working with cultural stakeholders to create evocative theatrical and musical experiences such as the Son et Luminere music and light shows that have previously been held in St. Mary's Cathedral and King Johns Castle and take on a more active promotion of musical events in atmospheric or unusual venues. Promote and enhance accessibility to authentic experiences that allow the visitor to directly engage with local people and hold more spontaneous pop-up events in collaboration with cultural groups and events management organisations (performance art, outdoor cinema, music events, proms in the park, picnics, fitness and sports related events etc.)	Tourism Unit, Festivals and Events Unit - Arts Office - Limerick City and County Council	Music Generation Limerick, Irish Chamber Orchestra, organisers of music festivals such as Limerick Pipe Organ Festival, Limerick Jazz Festival Organisers, Fleadh by the Feale Traditional Music Festival			

Action Area No.	Theme 4 – Alive and Kicking	Leader	Other Key Actors	Timeframes		
				Start Now: Quick Wins 1-2 year projects	Start Soon: 2-6 year projects	Slow Burn / Long Term Projects
	Continue to work with event organisers including sporting and arts venues to offer an exciting and diverse calendar of year round events that have a broad appeal attractive to both visitors and local people.	Tourism Unit, Festivals and Events Unit - Arts Office - Limerick City and County Council Tourism Unit, Festivals and Events Unit - Arts Office - Limerick City and County Council	Event organisers, Irish Rugby Football Union, Munster Rugby, Limerick Sports Partnership			
3.0	Made in Limerick					
3.1	Investigate the feasibility of a Made in Limerick retail store to be situated in Limerick City providing an official outlet for high quality craft goods, fashion and food produced in Limerick. In support of this: - Tap into the talent and skills of Limerick's crafts people e.g. work with lace makers and the Limerick Museum to continue to raise the profile of Limerick Lace and to extend the tutorial series with master lace makers. These could be combined with jewellery and glass making workshops in venues across the city and county such as Ormiston House – Cultural Resource Centre.	Tourism Unit, Arts Office, Local Enterprise Office - Limerick City and County Council	Limerick Arts and Cultural Exchange (LACE), LIT School or Art and Design, Local Art courses, local artists			
	- Work with Limerick designers, design colleges and retailers to showcase Limerick fashion and millinery through ongoing promotion of the 'Made in Limerick' branding programme.					
3.2	Provide memorable food experiences for visitors by encouraging a greater uptake and use of local artisan products in pubs, cafes, restaurants and hotels, and create visitor experiences that showcase Limerick's food provenance in unique settings (e.g. Downton Abbey style culinary experiences at the Milk Market and Georgian Limerick, waterside fishing/dining experience). Advance measures recommended in Limerick Food Strategy to promote the Golden Vale as a potential food brand for Limerick.	Tourism Unit, Arts Office, Local Enterprise Office - Limerick City and County Council	Hotel groups, restaurants, farmers markets, local food producers			

Action Area No.	Theme 4 – Alive and Kicking	Leader	Other Key Actors	Timeframes		
				Start Now: Quick Wins 1-2 year projects	Start Soon: 2-6 year projects	Slow Burn / Long Term Projects
4.0	Lights, Camera, Action					
4.1	In collaboration with the Irish Film Institute, Troy Studios and other relevant stakeholders, continue to promote and market Limerick as a location to international film production companies. Commission a short film series celebrating all the places, attractions and people that make Limerick special. To create a real impact across social and mainstream media channels, the film series must capture the passion and spirit of the county, the epic adventures that await, the creative energy of its people, and the spectacular sites that exist throughout the county in an emotive and breath-taking way.	Tourism Unit, Arts Office - Limerick City and County Council	Irish Film Institute, Troy Studios, LACE, local film makers, Shannon Region Conference and Sports Bureau			
5.0	After Dark					
5.1	In coordination with the Street Charter movement proposed in 'Gearing Up', continue to develop night time activities to enliven Limerick City and its towns and villages during the evening, capitalising on Limerick's Purple Flag status. A key step in this would be to liaise with retailers, cafes and restaurants to extend their opening hours into the evening.	Tourism Unit, Property and Planning - Limerick City and County Council	Limerick Chamber, Restaurants and Retailers			
5.2	Atmospheric walking tours of Medieval Limerick touring King Johns Castle, St. Mary's Cathedral, the Treaty Stone, St. Munchin's church and grave. Themed after dark tours can be arranged in line with key holidays such as Halloween. Places such as St. Munchin's and King John's Castle provide the ideal setting for atmospheric visitor experiences such as the Spooktastic events at Halloween – this would involve the participation of local drama and theatre groups.	Tourism Unit, Festivals and Events Unit - Arts Office - Limerick City and County Council	Civic Trust, LACE, Film Institutes, Music, Theatre and Drama Groups, Limerick Sports Partnership, Limerick Youth Theatre, Dance Limerick, Foroige and other youth clubs			
6.0	Going the Extra Mile					
6.1	Develop a continuous and coordinated schedule for events through the year and set in place the necessary transport provisions so that visitors can conveniently move between urban and rural locations.	Tourism Unit, Smarter Travel, Limerick City and County Council	Public and Private transport operators, Department of Transport, Tourism and Sport			

Action Area No.	Theme 4 – Alive and Kicking	Leader	Other Key Actors	Timeframes		
				Start Now: Quick Wins 1-2 year projects	Start Soon: 2-6 year projects	Slow Burn / Long Term Projects
6.2	Facilitate coordination between sports and local arts and cultural groups so that follow up events and festivals are coordinated to take place around the city and county before and after match fixture weekends (linked to Energy Unleashed Action 7.1).	Tourism Unit, Festivals and Events Unit - Arts Office - Limerick City and County Council Tourism Unit, Festivals and Events Unit - Arts Office - Limerick City and County Council	Irish Rugby Football Union, Munster Rugby, Limerick Sports Partnership Event organisers			
7.0	Reading Between the Lines					
7.1	Invite contemporary Limerick writers and artists (e.g. Kevin Barry, Rubberbandits) to contribute to a “My Limerick” insights magazine or book series. Extend and develop an interpretation programme for a Limerick Literary Trail and take steps to promote Limerick's literary heritage such as 'Bring your limerick's to Limerick' poetry competition or festival.	Tourism Unit, Festivals and Events Unit - Arts Office - Limerick City and County Council	LACE, Local writers, poets, musicians, bands, singer songwriters, organisers of literary events/festivals			

6.0 Monitoring and Evaluation

6.1 INTRODUCTION

A relevant measurement framework, establishing key performance indicators (KPIs), is essential to monitor the effectiveness of the tourism performance of Limerick. While national agencies including Fáilte Ireland and the Central Statistics Office gather data on tourism volume and behaviour, this information is often not available at a sub-regional level or not updated regularly enough to respond to ongoing market changes. The integration of monitoring and measurement as a key part of any action plan is good practice as it helps to refine future activities to either capitalise on positive outcomes or to prevent unnecessary wastage.

The measurement mechanisms recommended as part of this strategy will include both quantitative and qualitative elements to capture the success of the county in meeting the expectations of visitors and identifying how many visitors arrive, how long they stay and how much of a contribution to the economy that they make. The aim is to ensure that those involved in tourism in Limerick have the data and understanding they need to guide future plans and investment decisions. The strategy seeks to establish additional forms of monitoring and measurement that will provide consumer feedback on their experiences within the county as well as measuring the outcome of all activities undertaken as part of this Plan.

6.2 MONITORING AREAS AND INDICATORS

A key outcome of the information gathering process is to be able to assess the performance of the county in attracting additional tourist numbers, additional tourist spend and improved tourist satisfaction. It will also be important to examine the motivations of those who are attracted to the county and how to evolve and align the underlying proposition with this. This will include measures such as the following:

- Increased awareness of the county and its attractions (measurable by visitor surveys, traffic to key websites);
- Increased visitor satisfaction in the county (measurable by visitor surveys);
- Maximised revenue and length of stay in Limerick (liaise with Trending.ie and hoteliers/accommodation providers on RevPAR rates);
- Increased visitor numbers to the county to attractions and events (tourism provider records);
- Longer tourist season within the county (tourism provider records);
- Increase in number of Fáilte Ireland registered attractions and services (Fáilte Ireland registrations);
- Increased employment levels in the tourism sector and in complementary sectors (CSO employment data); and
- Relative performance in the Shannon Region and nationally (liaise with Shannon Group, Fáilte Ireland and other relevant stakeholders for suitable measures).

Central to this is coordination with Fáilte Ireland in extending information gathering services at local authority level.

In addition, there is a need to promote data gathering and dissemination by tourism providers within the county, to maximise awareness of the extent of tourist activity in the county and to improve information gathering in relation to the extent and type of visits. This should include information in relation to visitor numbers, where visitors are from, information on length of stay and average spend, why they came, what attractions and activities were carried out, and crucially the level of satisfaction with the experience offered in the county. Further information on other places visited, and how they heard about the county would further assist in targeting promotional activity.

Tourism accommodation trends are currently only available at a regional level. Disaggregated information for Limerick would assist in showing more clearly any gaps in provision to meet the demand and potential for the county.



Monitoring of the organisation of tourism will allow the benefits of networks, coordination between partners and the development of common goals to be examined. This will include measures such as examining the number of partnership projects developed or the extent of linkages between themed assets in other parts of the region (e.g. with the Wild Atlantic Way, Shannon Way Pilgrimage, Munster Vales etc.).

Monitoring the quality and success of communication will assist in targeting future promotion or the value in approaches. This will include identifying trends in web traffic, notably on limerick.ie and viewing trends in other web-based businesses, such as Airbnb, TripAdvisor, and from local providers.

Tourism accommodation trends are currently only available at a regional level. Disaggregated information for Limerick would assist in showing more clearly any gaps in provision to meet the demand and potential for the county. This will include examination of the sector seasonally and against the other counties in the region.

Measuring the value for money of investment in tourism offers is essential. Information on tourist origin, type of tourism (e.g. leisure, business etc.), and average spend will allow a more accurate picture to develop and assist in identifying the impact of investment in the sector. The gathering of ongoing attraction and event-specific information on visitor numbers and the tourism profile of the county, as outlined above, is a short-term action of this strategy and is necessary to allow its success to be measured. In the medium-term, more targeted information gathering to derive economic impact and levels of satisfaction should be put in place.

6.3 EVALUATION

The impact of the strategy will be monitored and evaluated. This will be done by examining it in terms of impact on sustainable tourism development. This examines performance in terms of the impact on Visitor, Industry, Community and Environment. Areas of importance will comprise the following areas:

- Economic – contribution to local economic performance, including spend in the county, increased employment in relevant sectors, such as accommodation and food, increases in new business formation etc.
- Social – increased awareness of value of local environment and engagement by local communities.
- Cultural – the integration with cultural activity and its promotion to a wider audience.
- Image and identity – does the strategy mark Limerick as a place apart and does this identity support the wider promotion of the county, e.g. for business attraction and promotion.
- Environmental – does tourism development lead to improved or degraded environmental performance, such as quality of protected areas or increased traffic.
- Organisational – does the strategy enhance organisational goals, improve partnerships and networks within the county and across the Limerick Region.

Appendix 1

List of Consultees

Participants of the **Public Workshops** held in Adare, Templeglantine, Kilmallock and Limerick City are set out overleaf.

Name(s)	Organisation
Amanda Slattery	Ballyhoura Development
Ann O'Carroll	Citizen
Annette Hayes	Ballyhoura Development
Anthony O'Dwyer	Publican
Anthony Sheehy	Civic Trust Askeaton
Audrey Ruttle	Irish Palatine Museum
Barry Murphy	Limerick City and County Council
Barry O'Kelly	Foynes Flying Boat Museum
Ben O'Sullivan	Ballyhoura Fáilte
Brian Kennedy	Limerick City and County Council
Carmel Ryan	Limerick Institute of Technology
Caroline Rigney	Rigney's Farm
Caron Tierney	Limerick Dragons
Catriona O'Donoghue	Get West
Christy Shanahan	Stone Hall Visitor Farm
Cian O'Carroll	Citizen
Clare Jordan	Limerick Open Navigation Group
Colman Byrne	Limerick Open Navigation Group

Con Quigley	BDO/EVA
Damien Ahern	West Limerick Resources
Dave O'Connor	
David O'Brien	Limerick Civic Trust
David Thompson	Heritage owner
Denis McAuliffe	Great Southern Trail
Dennis Daly	
Eibhlín Uí Mhurchú	West Limerick Tourism
Eleanor Purcell	Adare Tidy Towns
Frank Larkin	
George Stacpoole	Adare Tidy Towns
Helen Dagnall	Kantoher Development Group
Helen O'Connor	West Limerick Resources
James Harnett	Abbeyfeale Community Council
Jennifer Caffrey	Marketing Consultant
Jennifer MacDonald	West Limerick Heritage Network
Jim Barrett	Pedal Pursuits Bike Hire
Jim Gallivan	Irish Rail
Joe Kelleher	Kantoher Development Group
John O'Mahoney	
Johnathan Sykes	Springfield Castle
Joseph G Burke	Business
Judy Reardon	The Design and Craft Studio, Charleville
Kate Harrold	Lough Gur Visitor Centre
Katie Clancy	Limerick Institute of Technology
Kevin Begley	Coolwater Garden

Kevan Locke	
Lorna Shier	Irish Palatine Association
Lorraine Crosse	Marketing consultant
Lorraine Grainger	LG Consult
Louis Murphy	Dunraven Arms Hotel
Maeve Martin-Kelly	West Limerick Tourism
Majella O'Brien	Limerick City and County Council
Marie Keating	Kantoher Development Group
Marie O'Connor	Local Link
Margaret Atalla	Deebert House Hotel
Martin O'Regan	Visitor Flix
Mary Fitzgerald	Woodlands Hotel
Mary Kury	St. Kieran's Heritage Association
Mary Normoyle	Fanningstown Castle
Maureen Curtin	Air B&B
Maurice O'Connell	Abbeyfeale Community Council
Mike Riordan	Tour Driver/Guide
Nicky Woulfe	Woulfe Event Management
Noel Gleeson	Limerick City and County Council
Olivia Gardiner	Adare Woollens
Paddy Fulham	NCW District Chamber of Commerce
Pat Fitzgerald	
Patricia O'Donnell	
Paul Austin	Get West
Peter Hennessy	

Rachel McCarthy	Ballyhoura Development
Ray McMahon	Publican
Rhianna Laubach	Ballyhoura
Rosemary Flanagan	Knocklong History Group
Rosemary Purcell	Black Abbey crafts
Seamus Fox	Irish Clan Search
Sean Neenan	Broadford Ashford Walking Trails
Sharon Noonan	West Limerick 102
Stephan Lundstrom	Limerick Strand Hotel
Stephen O'Dowd	Masters Student
Sue Foley	Clonshire Equestrian Centre
Teresa Wallace	Askeaton Tidy Towns
Tim Madden	Ballyhoura Development
Tracy Lenihan	De Valera Museum and Bruree Museum
Trish O'Sullivan	Innovate/Kantoher
Vikki Jackson	Genesius Theatre
William Buckley	Video Production

Strategic consultations were held with the following representatives of public and private organisations with an interest in the tourism sector in Limerick.

Name(s)	Organisation
Minister Patrick O'Donovan	Former Minister of State for Tourism and Sport (now serving as Minister of State at the Department of Finance)
Tony Brazil	Limerick Travel
Karen Burke	Forward Planning, LCCC
Tom O'Neill	Heritage, LCCC
Karen Brosnahan	Shannon Region Conference and Sports Bureau
David O'Brien	Civic Trust
Laura Ryan	Head of Communications & Marketing, LCCC
Margaret O'Shaughnessy	Foynes Flying Boat Museum
Sheila Deegan	Arts and Culture Officer, LCCC
Donal Thurlow & Eleanor McSherry	Limerick Arts and Cultural Exchange (LACE)
Dr. Pat Daly	Deputy Chief Executive, Economic Development, LCCC
Dr. Noelle O'Connor	Senior Lecturer in Tourism Management, Limerick Institute of Technology (LIT)
Ruth Andrews	Incoming Tour Operators Association Ireland
Brian Harrington	Chair, Mid West Irish Hotels Federation
Tom Neville	TD, Fine Gael
Cllr. Eddie Ryan	Chair - Local Community Development Committee
Eanna Rowe	Waterways Ireland

Sarah McCutcheon	Executive Archaeologist, LCCC
Maria Byrne	Senator
Mick Kenneally	Shannon Foynes Port company
Rosie Webb	Senior Architect, Economic Development, LCCC
Siobhan King	Fáilte Ireland
Paul Mockler and Caeman Wall	Fáilte Ireland
Paul Keeley	Fáilte Ireland
Marie Slattery	Shannon Group, Head of Marketing
Niall Collins	TD, Fianna Fail
Mark Henry	Director of Central Marketing, Tourism Ireland.

Appendix 2 Part 1

Building on the Good Work Done

The Limerick Tourism Development and Marketing Strategy 2017-2023 will provide an overarching integrated framework to guide tourism development in Limerick. Key elements of existing plans and policies currently guiding the tourism sector in Limerick from national to regional to county and local plans are highlighted and an indication of opportunities that the Tourism Unit with overall responsibility for delivery of this strategy, will seek to exploit, are described brief below.

NATIONAL PLANS AND STRATEGIES

Ireland 2040 Our Plan - Draft National Planning Framework (September 2017)

The National Planning Framework presents a roadmap for future planning and development across Ireland up to the year 2040. Its purpose is to ensure that Ireland is well positioned to accommodate the extra one million people that will be living in Ireland, the additional two thirds of a million people working in Ireland and the half a million extra homes that will needed by 2040. Ambitious population and employment growth targets are set out for Limerick and the three other regional cities of Cork, Galway and Waterford. Along with Dublin, these four cities will be targeted to accommodate 50% of overall national growth between them. Supporting this growth with appropriate improvements and upgrades to infrastructure, housing, employment and amenities is a central provision of the draft NPF.

The draft NPF endorses measures taken in recent years to enhancing Limerick's growth potential with Limerick Regeneration and the Limerick 2030 initiative specifically referenced. The vision for Limerick set out in these initiatives to grow and diversifying the City's employment base, attract more people to live in the City, improve housing choice and enhance facilities and infrastructure will contribute to a more vibrant City and County which will, in

turn, support the visitor centred economy advocated in this strategy. Key future growth enablers set out in the draft NPF for Limerick include initiatives set out in Limerick 2030 such as the a series of transformational city centre public realm projects, extension of the City Centre towards Limerick Docks, the development a strategic cycleway network, and enhances accessibility from the City Centre to Shannon Airport. These initiatives will all contribute to the vision and objectives of the Tourism Development and Marketing Strategy for high quality places that will appeal to visitors.

People, Place and Policy, Growing Tourism to 2025

- Empowers Local Authorities and local communities to drive tourism at a County level – this is a key underpinning of this strategy.
- The people centric approach advocated is critical to the success of this strategy: Local networks, volunteers, connections.
- The value of place is a cornerstone of this strategy with actions focused on improving the quality of places surrounding key sites and attractions in Limerick, delivering a complete experience package for visitors that is authentic and true to itself.
- Thematic actions are proposed in this strategy that will appeal to the three key market segments identified in this national plan i.e. the Culturally Curious, Great Escapers and the Social Energisers.
- Adoption of strategic actions on events and training on foot of recommendations set out in the national strategy.

Realising Our Rural Potential: The Action Plan for Rural Development

A key element of the National Action Plan for Rural Development is to maximise the potential of rural tourism and recreation. The Limerick Tourism Development and Marketing Strategy will make a significant contribution to deliver on objectives of this plan in the following areas:

- Contribution to increasing overseas visitors to rural Ireland by 12% by 2019 – Limerick's target to significantly increase overseas visitors to County Limerick (including urban and rural areas) will greatly contribute to this national target.
- Enabling the County wide implementation of Pillar 3 of the Action Plan on rural tourism with specific actions to develop the County's blue ways, greenways and activity tourism in rural areas throughout Limerick (in line with Action no.'s 167, 168 and 169 of the national plan) and in developing cultural digitisation initiatives to enhance 'Ireland's Roots' tourism offering (in line with Action no. 159).

- Enabling the implementation of Pillar 5 in Co. Limerick – 'Improving rural infrastructure and connectivity transportation links or digital connectivity.

National Action Plan for Jobs

The Government's Action Plan for Jobs 2017 comprises a range of measures to stimulate growth in the tourism sector. The Tourism Development and Marketing Strategy contributes to the delivery of these measures in the following ways:

- The plan addresses the possibility of a decline in visits from Great Britain as a result of Brexit by calling for an acceleration of diversification opportunities for overseas tourism which this strategy is designed to do through optimisation and extension of existing tourism initiatives and the introduction of new initiatives to support tourism growth across the city and county.
- In delivering this strategy, the Tourism Unit of Limerick City and County Council will explore all available funding opportunities including the Action Plan commitment to support jobs in rural communities through investment in rural tourism via the EU LEADER programme funding.
- The Tourism Unit will also seek to access a new suite of business supports committed to as part of the Action Plan that are intended to enable the tourism industry to maximise its potential in growing tourism export earnings. As part of this, Fáilte Ireland and Tourism Ireland are to develop strategies for seasonal spread of tourism demand and regional dispersal to drive sales where there is underutilised capacity. The events sectors, particularly sporting events, also feature in the Action Plan with a target to secure a minimum of four new events for Ireland (generating an estimated €30 million in revenue). The Tourism Unit and Events/Festivals Unit will work closely with Fáilte Ireland to promote the selection of Limerick as the host city for one of these events (as described in Section 5.1 Gearing Up and Delivery).
- Other actions include building the impact of investment in the arts sector both at home and abroad, and building an awareness of the range and quality of work produced by Irish artists. Support for a wide range of arts venues, festivals, arts organisations, touring initiatives and cultural digitisation initiatives to support Ireland's roots tourism is to be provided.
- The Action Plan emphasises heritage tourism initiatives, including investment in regional art and cultural centres, development of trailways, and blueways (including on the Shannon) to expand recreational tourism offering – a core element of actions set out under the Into the Blue theme.

REGIONAL PLANS AND STRATEGIES

Wild Atlantic Way and Ireland's Ancient East

On a regional level, the most important initiatives of recent years are Fáilte Ireland's major propositions – Wild Atlantic Way and Ireland's Ancient East.

- With its 'gateway' association to the Wild Atlantic Way and just the area around Foynes in West Limerick forming part of the official route, Limerick's has a somewhat peripheral position in this hugely successful brand. However, a huge opportunity for Limerick to exploit its proximity to the WAW and to intercept visitors to the WAW and encourage them to explore the City and County exists with Fáilte Ireland's forthcoming plan to introduce a Wild Atlantic Way Zone and the Shannon Estuary Way.

Mid West Region Action Plan for Jobs 2015-2017

The Mid West Action Plan for Jobs 2015-2017 states that "it is very important that strong product development continues in the Region's tourism infrastructure which is aligned to a cohesive marketing programme featuring the Region's excellent accessibility from outside and within Ireland, its strong product and accommodation base, and its attraction to each of the key Fáilte Ireland market segments – Great Escapers, Culturally Curious and Social Energisers. There also needs to be a close alignment of the marketing activities of public and private sector bodies involved in tourism promotion and the active tourism trade that exists in the Region". The Plan includes a series of tourism related actions including the development of a series of loops off the Wild Atlantic Way (i.e. now referred to as the Shannon Estuary Way). Other actions focused on sports tourism event led activity, food and beverage tourism, and developing business supports in the areas of visitor experience, digital and sales.

Strategic Integrated Framework Plan for the Shannon Estuary

The Strategic Integrated Framework Plan (SIFP) comprises a series of objectives designed to address the multi-functional nature of the estuary including its recreation and tourism values. The goal of the tourism and leisure strategy included in the plan is 'to facilitate and promote the sensitive and sustainable use of Shannon Estuary's assets in an integrated manner leading to the development of a

dynamic and sustainable tourism sector that delivers maximum social and economic benefit to the communities of the Estuary while safeguarding valued landscape, heritage and environmental interests'. The 'Into the Blue' thematic actions set out in this strategy, in particular through the provision of a Blueways Masterplan for Limerick, are intended to complement and support the delivery of SIFP objectives including:

- Sustainable development of appropriate tourism and leisure projects.
- Sustainable development and upgrading of marine facilities at appropriate locations.
- Facilitate the expansion of existing marine based leisure schemes and the development of new opportunities for eco-tourism and water sports.
- Facilitate an evaluation of the tourism/leisure potential of the islands in the context of environmental designations/sensitivities.

COUNTY PLANS AND STRATEGIES

Limerick County Development Plan 2010-2016 (as extended)

The Limerick County Development Plan 2010-2016 (extended) sets out a vision to enhance the lives of people who live in, work in and visit the County, whilst protecting the natural and built environment. This vision is underpinned by several core strategic planning policies, the following of which provide a basis for tourism development as a key economic driver in the County, and to which this strategy are given effect:

Policy CP 08: To ensure that the character and vitality of established town and village centres and the rural areas are maintained and enhanced, that quality underpins all new development by creating and maintaining a sense of place and local distinctiveness in established and new development areas, and that the rural resources, including agriculture and tourism are maintained and enhanced whilst encouraging diversification.

Policy CP 09: To promote County Limerick as a local and regional centre of trade, business and tourism, while encouraging employment growth and economic activity.

Economic development policy that is specifically targeted to the tourism sector focuses on the sustainable development of tourism attractions and facilities in the County (Policy ED P18 and Policy ED

P19). Four tourism objectives are set out in support of these policies, as set out in summary form below:

- Objective ED O17: Tourism facilities and environmentally sensitive areas – tourism facilities not to be located or designed where they would be significantly detrimental to environmentally sensitive areas, areas or archaeological potential or historic landscapes.
- Objective ED O18: Facilities and amenities incidental to tourist and recreational attractions and scenic views to be permitted where they allow attractions to be enjoyed and accessed, the basic needs of the public are met, sensitive features are protected, are adequately served and managed and inclusive to all members of the community.
- Objective ED O19: Location of tourism facilities – generally required within existing settlements to support the provision of services and economic vitality.
- Objective ED O20: Sustainable forms of niche tourism to be facilitated, where appropriate.
- Objective ED O21: Renovation and adaptation of established buildings for tourism and other appropriate uses to be assessed in accordance with specific criteria including the intrinsic qualities of the building and its setting.

Limerick City Development Plan 2010-2016 (as extended)

The vision of the Plan is for Limerick City to continue to grow as the centre of economic, social and cultural development for the Mid-West Region. The plan takes a collaboration approach to tourism development linking it with arts, culture and creativity to support the economic and social development of the city. The plan recognises the need for greater diversity in the tourism product offered by the city and a requirement for investment in marketing, product development and the provision of quality accommodation and infrastructure facilities. Policies and objectives are set out for sustainable tourism, theme trails, tourism facilities, tourist attraction opening hours, King John's castle, tourism signage, festivals and events, cultural heritage including the promotion and development of cultural quarters in the city, are reflected in the thematic actions set out in this strategy.

Limerick Local Economic and Community Plan (LECP) 2016-2021

The Limerick Local Economic and Community Plan (LECP) 2016-2021 has identified 9 key strategic goals that inform the City's economic and community development and are intended to improve the quality of life and well-being of communities and for citizens in Limerick.

Associated with the goals are pillars and cross cutting themes, for which specific action areas have been defined. Many of these actions have direct relevance to the growth and expansion of the tourism sector. The economic action of most relevance to tourism growth and development is Action Area 1.6 Promotion and Marketing, and specifically sub-action 1.6.7:

- ‘Support the marketing strategies / actions of local cultural institutions and tourism in city and county (museums, natural and heritage attractions, recreation and leisure). Link into specific tourism initiatives in a coordinated way to increase the overall tourism offer / mix – including, for instance, the Great Southern Trail, Ireland’s Ancient East, connections to the Wild Atlantic Way. Tourism marketing is one of specific action areas under LEADER while city-based tourism can also be further promoted’.

This action has been reflected across several of the thematic action areas set out in this strategy, for example, Action 2.2 of Medieval Strongholds on consolidated and supporting the coordinated delivery of existing plans and initiatives for heritage across Limerick.

- Furthermore, in preparing the community element of the LECP, the SWOT analysis highlighted the absence of a tourism destination management support scheme as an issue for attention in communities with potential to develop rural tourism. The long term aim of establishing a Destination Management Taskforce to be led by the Economic Development unit of Limerick City and County Council, the exiting Tourism Unit and the proposed Tourism Charter and Tourism Forum address this issue.
- The Physical/Environmental pillar highlights opportunities to deliver new tourism facilities under the governments capital infrastructure plan, Building on Recovery: Infrastructure and Capital Investment 2016-2021 under Action 3.1.01 of 3.1 Public capital/infrastructure programme. Furthermore, Action Area 3.2 Urban and Town and Village renewal provides for ‘the development of strategic recreation/ leisure facilities building on the natural and historic / heritage and cultural resources in parts of the city and county, to improve quality of life and well-being for the population, making areas more attractive to visitors and encourage tourism based enterprise’ (refer to Action 1.1 of Into the Blue).

Limerick 2030: Economic and Spatial Plan for Limerick

The Limerick 2030: Economic and Spatial Plan for Limerick is to position Limerick as a magnet for growth so that it can take best advantage of new economic opportunities, generate a significant level of new job creation, and market Limerick as a place to live, work, visit and invest in. The Spatial Plan for the City Centre addresses 8 key objectives one of which is to ‘To establish a unique tourism offer that takes full advantage of the City Centre’s special heritage and environmental characteristics’.

Quality of place is essential to ensuring the successful expansion of Limerick’s tourism industry, and measures such as improvements to the public realm and City Centre infrastructure taking place as part of Limerick 2030 are instrumental to this. Other Limerick 2030 projects that have been identified as playing a direct role in achieving the vision, objectives and targets of this strategy are as follows:

- Cleeves Riverside Campus – to include a major events space as set out in Alive and Kicking Action Area ‘Vital Venues’ Action No. 5.3.
- Troy Studios Film Hub – to coordinate with Alive and Kicking Thematic Action Area ‘Lights, Camera, Action’ Action Area No. 5.1.
- National Sports Cluster – to coordinate with Energy Unleashed Thematic Action Area 6 ‘Profile, Excellence and Innovation’ Action Area No 6.1.

Tourism – Statement of Strategy and Work Programme 201-2022

This Statement provided the initial response to the call for an integrated tourism strategy set out in Limerick 2030: Economic and Spatial Plan for Limerick and also proposed measures to align with and support the delivery of LECP objectives on tourism. The Statement provided a roadmap for tourism development across the City and County focusing on building competitiveness, product development and increased marketing. Product development actions reflected in this strategy include supporting dynamic development of new tourism offers in limerick, developing a driveway off the Wild Atlantic Way (Estuary Loop) and packaging of Limerick experiences. There were also actions for festivals and events including supporting large scale events, encouraging partnerships to establish Limerick as a base for Regional/National events including cultural, sporting and historic / heritage activities. Marketing and promotional actions set out included a revamp of Limerick.ie website, and local campaigns

to promote Limerick’s role in the Wild Atlantic Way. These actions are supported and have been integrated, where appropriate, to this strategy.

Limerick Cultural Strategy 2016-2030

Culture is one of the most assets of the Limerick’s tourism offer as reflected in the Alive and Kicking theme. The need to increase the visibility of Limerick arts and cultural activity is highlighted as a challenge for the Cultural Strategy to address, and this is something that actions proposed in Alive and Kicking also seek to address. The Cultural Strategy citizen-centric approach is very much advocated by this strategy with a partnership approach essential to the success of thematic experiences set out in Alive and Kicking.

Let’s Talk Festivals Research for A Framework for Limerick Festivals and Events

As described in Section 5.0 Gearing Up and Delivery, the Tourism Unit with overall responsibility for coordinating the delivery of this strategy is to ensure the direct involvement of a Festivals and Events Unit to oversee festivals and events in delivering the ‘celebrate and showcase’ action areas set out in the four thematic areas. The establishment of a dedicated unit for festivals and events in Limerick was a key recommendation of this important study which will be central to achieving the delivery of the vision for tourism set out in this strategy.

Food Strategy for Limerick 2016-2018

The Food Strategy for Limerick 2016-2018 sets in place a series of actions to deliver on recommendations set out in Fáilte Ireland’s “Food Tourism Plan 2014-2016” including offering an authentic, high quality core product that’s rooted in the locality and communicating through a compelling story the region’s food provenance. The Food Strategy for Limerick provides the basis for delivering on specific actions set out in this strategy including Actions 1.1, 2.5 and 4.1 of the Into the Blue theme, Action 3.2 of Medieval Strongholds and Action 2.3 of Alive and Kicking.

LOCAL TOURISM PLANS AND STRATEGIES

Limerick benefits from a wide network of tourism agencies and actors who are active around the county in promoting tourism products around the country. These organisations and the support of local communities are pivotal to the success of this county wide strategy, and it will be essential to gain their support through active participation as part of the sub-task forces for each of the four thematic areas and the Tourism Forum referred to in Section 5.1 Gearing Up and Delivery. A non-exhaustive list of important local tourism strategies and initiatives is provided below:

- Lough Gur Environmental Management Strategy.
- Ballyhoura Tourism the Way Forward 2020.
- Galtee Mountains: Tourism Development Facilitation & Project Management, June 2011.
- Slieve Felim Mountains Baseline.
- Mountain Bike Master Plan.
- Kilmallock Walled Town – Public Realm Plan.
- Assessing the contribution of tourism to the Ballyhoura area.
- Knocklong Railway Plan.



Appendix 2 Part 2

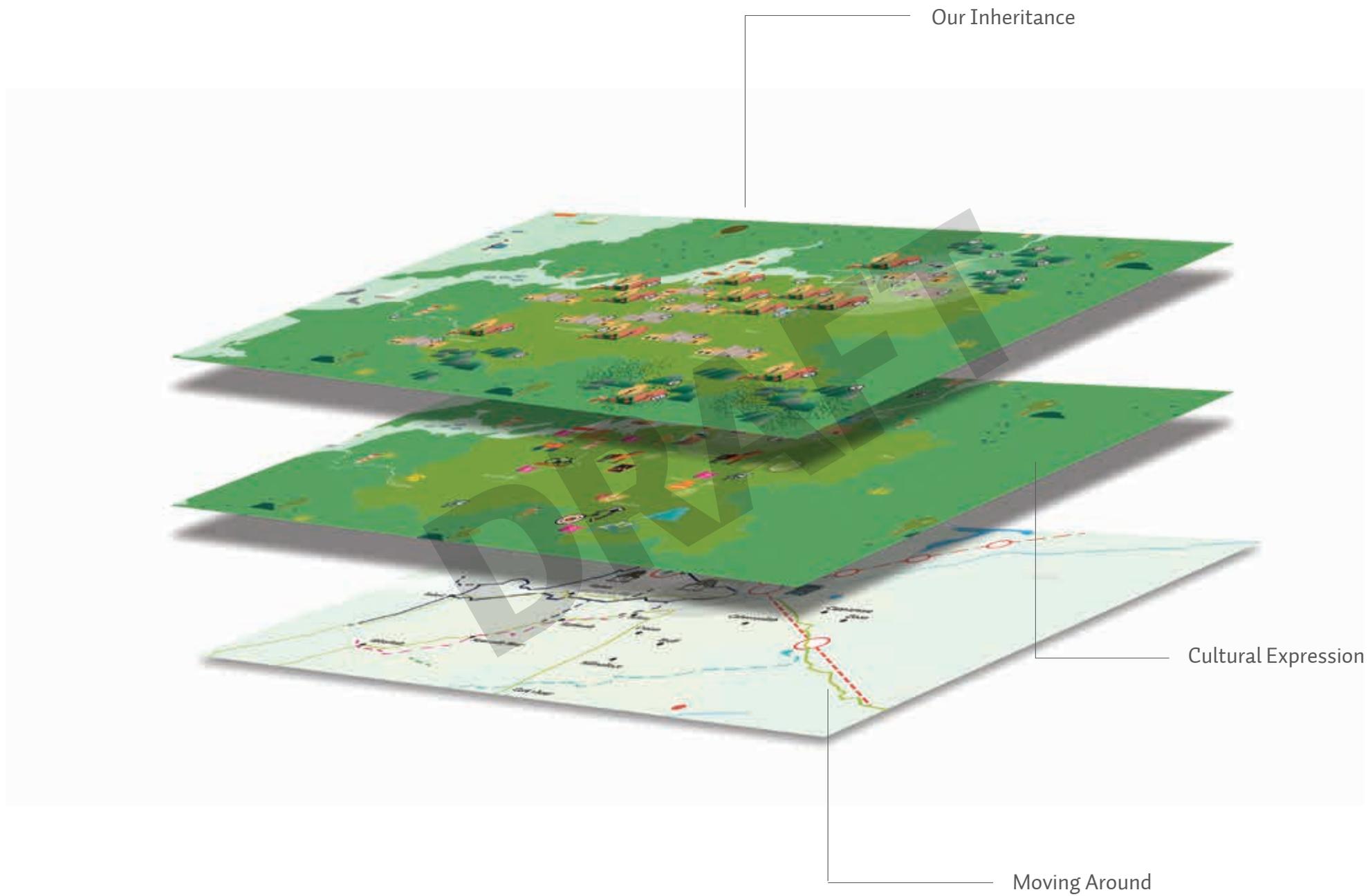
The Key Ingredients

A summary overview of Limerick's natural and physical attributes, its personality and place was provided in Section 3.0. This section presents a more detailed explanation of the key ingredients of central importance to Limerick's current and future tourism base.

THE KEY INGREDIENTS

The natural and physical attributes of the county, its rolling hillsides, flat central plains, towns and villages, the strong physical presence of Limerick City, the people who live here and the cultural life of the place are the core elements on which tourism thrives.

In driving the successful development of tourism in the county, it is critical to consider these attributes in detail, and the ways in which visitors currently access and engage with them. This is the foundation on which the thematic experience actions proposed in Section 4.0 below are based. As such, this section presents a summary overview of Limerick's landscape and historical features (**Our Inheritance**), the activities, culture and customs that bring the place to life (**Cultural Expression**), and the ways in which visitors are currently supported in moving around and accessing key attractions across Limerick (**Moving Around**).



OUR INHERITANCE

The Natural and Physical Environment

There is huge potential to share Limerick's landscape more with visitors to offer visitors more and different ways to get into and up close to nature. A map which places Limerick City centrally shows how geographically well positioned the county is to offer visitor experiences within uplands, lakes, fertile agricultural plains, rivers, karst landscapes, coast and estuary. The Limerick visitor has the opportunity to experience uplands of various characters – already accessible by way of walking and cycling trails and loops - the Ballyhouras, Galtymore (highest inland point in Ireland), Slieve Felim Way, Mullaghareirk Mountains and the Clare Glens just north of Limerick City. The rich and fertile agricultural heartland of Limerick has supported communities for millennia, their marks still visible in the landscape across the county – and continues to provide a robust basis for contemporary food production. The rivers of the county and the Shannon Estuary make Limerick a place where water and waterside experiences can be at the centre of the visitor experience. Limerick City itself is 30% green space with 3.52km of nature rich areas to potentially explore – the city's Special Areas of Conservation - and can offer a magical combination of exciting urban life and nature up close.

The four workshops carried out as part of the development of the strategy have captured local knowledge and insights into the places where visitors can best access Limerick's natural environment – through high adrenaline pursuits, or more gentle encounters. There is much scope to expand on the existing network of ways to access Limerick's natural environment, and to sensitively manage the ambition to increase visitor numbers and revenue.



There is huge potential to share Limerick's landscape more with visitors – to offer visitors more and different ways to get into and up close to nature.





History and heritage

The built heritage inheritance has formed a cornerstone of Limerick's tourism strategy to date, however, it is in need of a refresh to meet the changing needs of visitors, bringing the experience beyond “stones and bones”. There are great opportunities now to better communicate the stories of Limerick's portals into the past, to provide the visitor with a broader experience within historic settlements – with particular focus on good food - and to spread the benefits of tourism to communities across the county.

Physical connections to the past – through the medieval building boom, as far back to 812 when Viking settlers founded Limerick, and even further back to the mysteries of ancient monuments - are clearly evident in the network of historical sites and points of interest dispersed throughout the county in places like Lough Gur, one of

The built heritage inheritance has formed a cornerstone of Limerick's tourism strategy to date, however, it is in need of a refresh to meet the changing needs of visitors, bringing the experience beyond “stones and bones.”

Ireland's foremost archaeological sites, or in the towns with significant monastic and Norman structures and appealing 18th/19th century vernacular streetscapes including; Kilmallock, Newcastle West, Rathkeale, Adare, Askeaton, Bruff and Bruree.

Adare in particular has a well-established tourism infrastructure (and a detailed plan for its future) with a dedicated heritage centre and tourist information office to guide visitors to key attractions around the town. A heraldry and genealogy service is also available at the centre. The Desmond Castle, 14th century Augustinian Friary, the Trinitarian Abbey founded in c.1230, the Franciscan Friary, and Adare Methodist church are of great appeal, and the new Adare Manor will cater to a very high end visitor market. The challenge is to position the success of Adare within the broader medieval story throughout the county – and to encourage longer dwell times in the county.

Luckily, it is hard to travel far in Limerick without tripping over a castle, tower or abbey. The medieval town of Askeaton and the scenic position of Castle Desmond, which dates from 1199, on a rocky island in the centre of the town adds to the intrigue of the place, along with the medieval Franciscan Friary, the Hell Fire Club and other historical sites such as the Knights Templar Tower and the famine graveyard. In Newcastle West, the ruins of Desmond Castle and Banqueting Hall, dating back to the 13th century, stand impressively in the town centre just off the main square with 100 acres of parkland demesne surrounding the site to the south. Other highlights include the village of Glin, most famous for Glin Castle, and the ancestral home of the Knights of Glin; the home of the Ardagh Chalice near Newcastle West; Glenquin Castle near Ashford; the Augustinian Abbey and the Irish Palatine Heritage Centre at Rathkeale.





The importance of Kilmallock as a medieval town is evident by its intact medieval town wall, along with merchant's houses, 13th century Collegiate Church and the Dominican Priory. There is also a 15th century Blossom Gate, and the Famine Memorial Park, which was the burial ground attached to the workhouse. Kilmallock museum offers insights into the 19th and 20th centuries. A large model of medieval Kilmallock is also on show and guided tours are available.

Bruff offers visitors the Thomas Fitzgerald Centre which traces the ancestry of John F. Kennedy, and the Old Irish Ways Museum, where visitors can experience every day artefacts and displays replicating ordinary scenes of the past. The village of Bruree situated on the banks of the River Maigue was one of the seats of the kings of Munster from ancient times up to the end of the 12th century. De Lacy Castle overlooks the village which also includes several ring forts the De Valera Museum and the Bruree Heritage Centre.

Lough Gur is one of Ireland's most important, distinctive, and under the radar archaeological sites. The recently restored and upgraded heritage centre provides visitors with guided tours and shares the folklore associated with the place, and the ancient history associated with the area that includes castles, stone forts and circles including the Grange Stone Circle, and the enclosed habitation site on Knockadoon. There are also megalithic tombs known as the 'Giant's Grave' and early Christian sites at Carraig Aille and the crannóg at Bolin Islands. The specific characteristics of Lough Gur support a growing popularity for its use as a setting for mindfulness and yoga retreats and night bathing.

King John's Castle in recent years, has benefited from a €6 million investment, and given the focus on creating Great Streets as part of the Limerick 2030 ambition, can start to generate a significant focus on the wider medieval King's Island and urban connectivity to the other historical quarters of the city. While the city contains a huge range of historic structures, places and buildings (all with stories to tell, some not told yet) - the overall trajectory of the city's history can be best understood by the clear communication of the still legible "historic quarters and places" -

- King's Island (the medieval core, a fortified island, a defended space, hard to penetrate and unique for an Irish city),
- Irish town (centred around the Milk Market – ever fuelling and innovating)
- Newtown Pery (the faded grandeur – but regenerative ambition - of the compact Georgian quarter)
- The 19th and 20th century city centre (and the exciting plans for new squares, places and building uses)
- St. John's Square and surrounds – new cultural quarter
- The urban riversides; docks, boathouses, bridges, nature

King John's Castle in Limerick has benefited from major investment, and given the focus on creating Great Streets as part of the Limerick 2030 ambition.





Our Inheritance



Uplands

1. Clare Glens
2. Slieve Felims
3. Mullaghareirk
4. Ballyhoura
5. Galtee
6. Silvermines
7. Slieve Bernagh
8. Arra



Rivers/Lakes

9. Shannon
10. Lough Gur
11. Lough Derg
12. Maigue
13. Feale
14. Deel
15. Mulkear
16. Abbey



Parks, gardens and natural sites

17. People's Park
18. Knockpatrick Garden
19. Boyce Garden
20. Ballynacourty Gardens
21. Coolwater Garden
22. Curraghchase Forest Park
23. Adare Park
24. Abbeyfeale Town Park
25. Ballyhoura Nature Trail
26. Griston Bog
27. Newcastle West Demesne



Medieval towns; castles and conquests, saints and scholars

28. King John's castle
King's Island
St. Mary's Cathedral
29. Glin castle
30. Desmond Castle
Franciscan Friary
31. Desmond Banqueting
Hall and Castle
32. King's Castle and
Dominican Priory
33. Desmond Castle
Augustinian Priory
Franciscan Abbey
Trinitarian Abbey
34. Desmond tower house
Augustinian Abbey
35. Purt castle
36. De Lacy castle
37. Glenstal Abbey

Portals to Ancient Ireland



Lough Gur/Grange
Stone Circle



Megalithic tombs



Knockadoon
habitation site





Food and drink

Food quality and variety features highly on the lists of reasons why people visit Ireland. Fáilte Ireland's vision for food tourism is that: 'Ireland will be recognised by visitors for memorable food experiences which evoke a unique sense of place, culture and hospitality'. Fáilte Ireland makes available knowledge and support to the tourism and hospitality industry to assist them in providing memorable food experiences to the consumer.

Limerick's most widely known food association is ham and other pork products – and many places around the county, and indeed around Ireland proudly offer Limerick ham on the menu. Dairy products are also widely associated with the county. As with other parts of Ireland, a growing local foodie and cafe scene is widening the offer for visitors, however there are opportunities for some of the towns around the county to widen the range of food options for the visitor.

A range of artisan food producers are producing great food and drink around the county. Some of the most notable producers in the county include:

- Foynes – the home of Irish Coffee
- Eileen's famous Guinness cake
- Homemade fudge at the Old Creamery, Adare
- Adare Farm Ice-Cream
- Free range pork products – Kilonan Farm
- Brona Chocolate, Abbeyfeale
- Kearney's Home Baking
- The Green Apron
- Athea Black Pudding
- Pandora Bell
- Curraghchase Meats at Rigneys Farm
- Ballyhoura Apple Farm
- O'Brien's Artisan Farmhouse Cheese
- Gourmandises Time, Broadford
- Treaty Brewery, Ballysimon
- JJ's Brewery, Kilmallock

Fresh local products from local producers such as those listed above can be sampled at farmer's markets held regularly across the county in places such as Abbeyfeale and Kilmallock, celebrating local produce and producers and highlighting the area's rich food culture. The historical Milk Market in Limerick City hosts regular food producers' evenings, showcasing the finest in local artisan products.



CULTURAL EXPRESSION

Limerick’s cultural environment and its people’s customs, traditions and values form the personality of the place, and thus how it presents itself to the world.

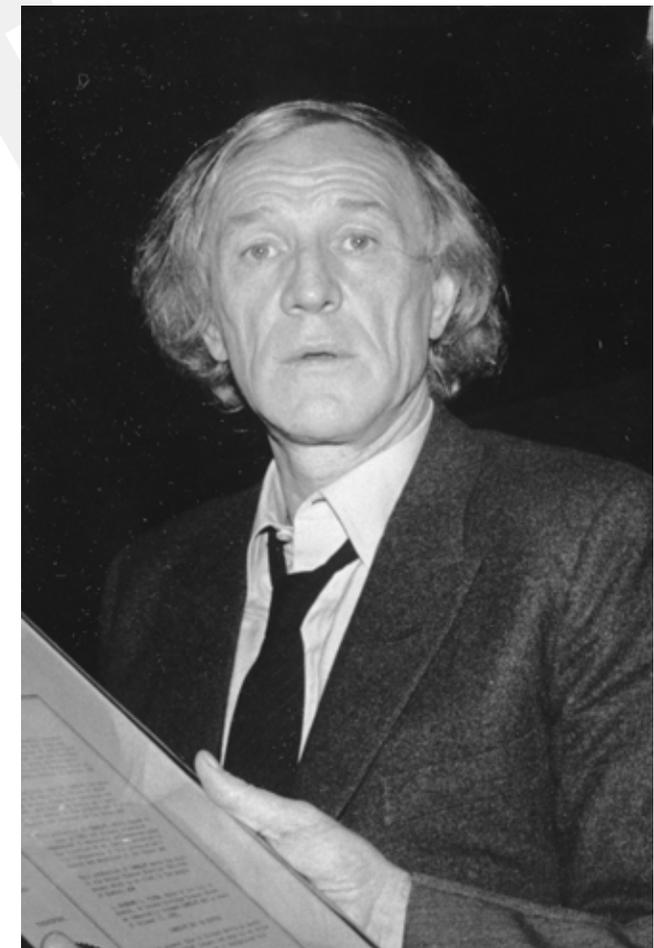
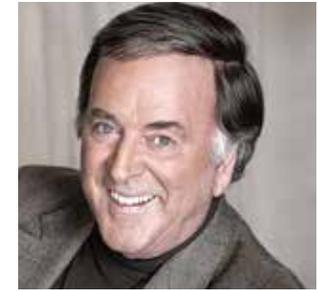
This is a hugely important aspect of Limerick’s tourism offering, and covers both the cultural legacies which are still alive today – the rambling houses, traditional music and story-telling, as well as the very much alive and kicking current arts scene which encompasses music, literature, dance, theatre, architecture, public, sculpture, digital, spoken word, visual and performance arts as well as emerging and exciting combinations of all of these.

People and Personality

Many celebrated people come from Limerick – writers, poets, singers and artists have been instrumental in promoting Limerick across the world. Significant historical figures associated with Limerick have included artists Aubrey de Vere, philosopher Elizabeth Anscombe, the novelist Charles Johnstone, and prominent Irish politician and statesman, Eamon de Valera. Limerick’s ancestry archives also proudly document the east Limerick village of Bruff as the home of Tom Fitzgerald, whose descendent John F. Kennedy, became the first Irish-American President of the United States. A more contemporary list of celebrated people would include President Michael D. Higgins, writers Kevin Barry, Frank McCourt, Kate O’Brien, Oscar nominated actors Richard Harris and Ruth Negga, broadcaster Terry Wogan, sports star, Paul O’Connell, comedy acts including The Rubberbandits and musical legends such as The Cranberries, Bill Whelan of Riverdance fame and Hermitage Green.

For international visitors, one of Ireland’s most appealing assets is its people – the ordinary people for whom the city, towns and villages across the country are home. People

visit Ireland because they want to engage with Irish people, hear their stories and engage with life as it is lived here. The combination of wit, drive, strength, innovation, friendliness and hospitality of the Limerick people is as much of an asset to the county’s tourism industry as any historic artefact. The country’s reputation as a friendly and laid-back place to visit is something that Limerick can offer in abundance. Limerick’s personality could be described as warm and natural with a unique wit and charm. The positive energy of local people and the way they interact with visitors is instrumental to the overall experience of that visitor and is central in how a place is perceived, and crucially, how it is recalled and recounted by tourists when they return home.



Arts and Culture

Limerick City is the arts and cultural hub of the Mid-West region. The city is home to an abundance of musical, art, theatre and dance venues. These range from major tourist attractions such as the Hunt Museum and the Limerick City Gallery of Art, to innovative dance centres such as Dance Limerick. There are several theatres – Lime Tree Theatre, the Limerick Institute of Technology Millennium Theatre, and the Belltable Arts Centre as well as live entertainment centres such as the University Concert Hall and Dolans Warehouse musical venue which regularly host national and international ballet, opera, comedy, drama and musical acts. Other attractions such as the Frank McCourt Museum, the Angela Woulfe Gallery, Normoyle Frawley Gallery and the Masonic Centre further add to the cultural fabric of the city.

The city is currently undergoing a surge of contemporary creative energy – happenings, events and exhibitions can be outside of traditional venues, transitory and by their very nature tricky for the visitor, new to the place, to access. However, given the fine-grained and bespoke information strands offered by digital media, those visitors interested in the most contemporary expressions of the Limerick art and music scenes are likely to find their way to what they are looking for. The challenge here is not to over-municipalise the current scene, while finding ways to offer access points to it for visitors that are interested.

The Foynes Flying Boat and Maritime Museum is the only aviation museum in Ireland, and the only flying boat museum in the world. It features a full-size replica of a B314 flying boat and a fascinating display of the earliest passenger flights across the Atlantic Ocean. The lives, legends and legacy associated with Ireland's largest river, the Shannon, is celebrated in the maritime section of the museum with a variety of exhibitions including visual interpretations of the life of a dock worker in the 1800s, and the tragic murder story of the Colleen Bawn.

The musical traditions of Abbeyfeale are celebrated at the annual Fleadh by the Feale Traditional Music Festival. Other traditional music nights are held regularly in venues across the county. Seisiún, a night of traditional music, song and dance

takes place in Adare and Templeglantine during the summer months, and there are also ballroom dancing nights held every Saturday night in Knockaderry community centre.

For those in search of the mystical Ireland, the village of Athea has a unique fairy trail which is home to ten fairies, providing an insight into the magical world of Irish fairy tales and folklore. Other arts and cultural attractions in the west Limerick include the Adare and Draíocht Galleries at Adare.

There are several active arts and drama groups based in the Ballyhoura Country region of South East Limerick with the Friars Gate Theatre, Kilmallock and the Honey Fitz Theatre at Lough Gur hosting local dramatic events and plays. The customs of Irish rambling houses are alive and well in Limerick with traditional music and storytelling nights held regularly throughout the year.





Sports and Recreation

Limerick is also renowned for its proud sporting heritage and this is key to the living culture of the place, embodying so much of what is great about Limerick and what is important to Limerick people. The county is synonymous with rugby, with Thomond Park, the home ground of Munster Rugby, and one of the city's major attractions. There are also regular fixtures for Gaelic football and hurling games held across Limerick. Other recreational activities such as golfing, cycling, mountain biking, horse racing, and fishing, have also played a role in building a 'great outdoors' culture within the county, which is a critical part of the tourism product on offer within the county.

Field sports

Limerick City is one of Ireland's great sporting capitals with excellent facilities and a large following for rugby, hurling, Gaelic football and soccer. The strong sporting heritage that is so central to the fabric and personality of the city was duly recognised when the City was designated as European City of Sport in 2011. Rugby is particularly popular with Thomond Park, the home of Munster Rugby, located within a short walk of the centre of the city. The presence of Thomond Park adds huge vibrancy to the city with an electric atmosphere on match days that creates excitement all over the compact city centre. The Munster Rugby Experience Museum at Thomond Park attracts large numbers bringing visitors on a behind the scenes tour to the player's zone and allowing them to test their skills in the interactive game zone. Gaelic games, hurling, camogie and football also have a large following throughout the county. The principal GAA stadium in the county is Páirc na nGael or Gaelic Grounds is home to the Limerick hurling and football teams. The stadium has also hosted a game in the International Rules Series between Australia and Ireland. Limerick FC soccer club is located in the city centre and regular matches are held in the Markets Field in the City. Limerick FC are in the premier division in the League of Ireland.

Water based Activities

Kayaking, paddle boarding, boating sailing, raft building are just some of the water based activities on the River Shannon and the Shannon Estuary. Among the guided trips available are Limerick City and Clare to Limerick kayaking trips. Visitors to Lough Gur in the south of the county can also partake in kayaking and canoeing activities, with white water courses taking place in Limerick on the Shannon at Castleconnell and the Mulcair River. Foynes Yacht Club hold regular racing events and offer sailing courses during the summer months.

With an abundance of rivers and lakes, as well as the Shannon Estuary, there are multiple opportunities for fishing around the country. Annacotty and Plassey are the two main angling venues on the Shannon close to Limerick City. The river network draining West Limerick offers some of the country's best opportunities for trout fishing with Bleach Lough and the Shannon Estuary also popular spots. Lough Gur, Dromore Lough are popular for coarse angling with Glasha Lake in Athea and Dohayle Lake near Rathkeale offer great trout fishing. Guided fishing tours are also available.

While Limerick is certainly not short of things to do on or near the water, the absence of an overarching strategy on the waterways, infrastructural and service deficits has meant that the full potential for this major tourism resource has not yet been realised.

Adventure

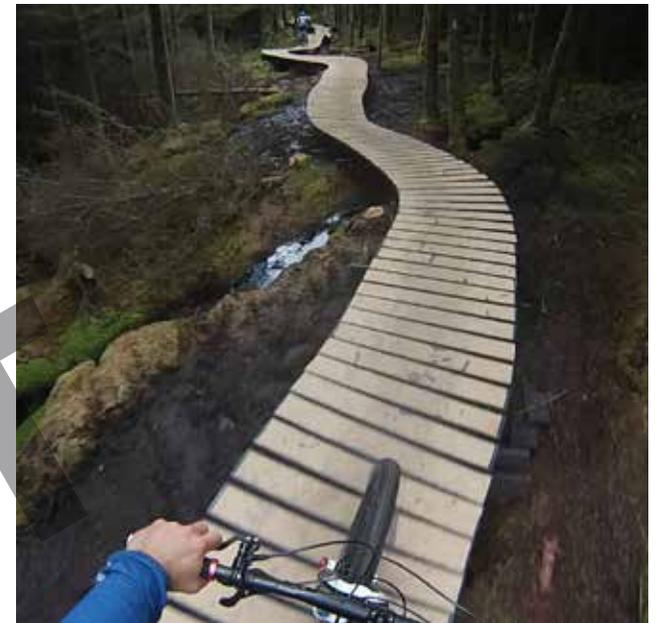
The wider county of Limerick offers a vast choice of activity based holidays to adventure seeking tourists. Activities likely to appeal to families and young people in West Limerick include paintballing at Basecamp Action Adventure Park, Shanagolden, StoneHall visitor farm and wildlife park at Curraghchase and Outdoor Karting in Kilcornan.. Action packed adventures await visitors to the Ballyhoura area of south east Limerick and Ballyhoura Development and local partners have been very successful in promoting this offering guided by a detailed tourism and marketing plan . The 98km of mountain biking trails available at Ballyhoura Mountain Bike Park, the largest trails of its kind in Ireland and recently called "Disneyland for mountain bikers", attracts thrill seekers from all over the country and

further afield who come to experience the vast trail network of trails and to avail of some of the best mountain biking facilities on offer in Ireland. The quality of the trails and supporting infrastructure available at the Ballyhoura park was formally recognised with the award for European Sport Tourism Venue in 2015. Also located in this part of the county is the Lazy Dog Clay Pigeon Shooting Centre and the Kilfinane Outdoor Education Centre with activities including canoeing, kayaking, raft building, rock climbing, abseiling, and orienteering available. The rugged open countryside of the Ballyhoura area is also perfect for orienteering and geocaching activities which can be arranged locally.





verfest on the Shannon



Golf

Limerick is also home to world class golf courses including Adare Manor Golf Course, Limerick Golf Course, Abbeyfeale Golf Club, Castletroy Golf Club, Rathbane Golf Club, Ballyneety Golf Club, and Newcastle West Golf Club. The Golf Course at Adare Manor is scheduled to open in March 2018. Less accomplished golfers can practice their skills at the Adare or Glenside Pitch and Putt Centres. Limerick is ideally positioned to serve as a base for a golfing holiday, with its strategic location within one hour drive of courses located in Clare, Tipperary, Kerry.

Walking, Cycling and Hiking

The River Shannon forms the backdrop to the Riverbank Walkway that runs from the city centre to the University campus. For those in search of a more strenuous walk, the Slieve Felim Way long distance trail of 44km (27-miles) is located 18km east of the city stretching from the village of Murroe to Silvermines Village in Tipperary. The Great Southern Greenway is Limerick's largest walkway covering a distance of 39km from Rathkeale to beyond Abbeyfeale. The trail follows a scenic route along disused Limerick-Tralee railway line which closed in 1977 after over 100 years in operation. It is also possible to cycle the trail with bike hire and guided tours available locally.

Other well developed trails in the county include the Broad-Ashford Walking trails through the Mullaghareirk Mountains, Curraghchase woodland trail, Glin heritage trail, and walkways through the Coillte Foynes recreation site on the banks of the River Shannon.

Walking tours and trails can be found throughout the south east of the country with trained guides on hand to pass on their wealth of knowledge on the built and natural heritage sights that form such an enduring part of the landscape of County Limerick. The annual Ballyhoura International Walking Festival has been attracting walkers to the region from throughout Ireland and overseas for over two decades.

Other sports and recreational activities

Limerick Racecourse is located just outside the city with a variety of day, evening and weekend horse racing fixings. The city also has a greyhound stadium with a selection of party and dinner packages available for an exciting night out. Other activities available in the city and around the county include go-karting, skateboarding at Limerick City Skatepark and Castletroy, swimming and diving at the Olympic-sized pool at UL, indoor rock climbing, and a selection of astroturf and multi-purposes pitches at Delta Sports Dome. If that wasn't enough, jump Lanes and Roller Jam (both in Ballysimon) provide indoor activities for all ages. Visitors to County Limerick can also enjoy horse riding at one of the county's many equestrian centres, clay pigeon shooting, archery and rock-climbing, horse riding, tennis, the list goes on. Coach tours exploring the hidden treasures of Ballyhoura Country (South & East Limerick) can also be arranged with a choice of fun and tailored packages such as the 'Castles, Caves and High Nellies' tour. Adare Manor Fields is a recreational facility for people of all ages and all abilities.

Access for children with disabilities

For children with disabilities, there is the Dreamland Fun Centre in Limerick City, Ireland's first all inclusive play centre. and the playground in Mungret which has been specifically designed to suit the needs of the disabled. Other options include autism friendly horse riding.

Sports Innovation and Business Cluster

Sport tourism represents that fastest growing sector in global tourism. According to the World Tourism Organisation (2013), it generates €450 billion annually and is anticipated to grow in the region of 14%. Given Limerick's world class facilities, reputation and passion for sport, it is ideally placed to target the international sports tourism market. There is huge potential to develop the sector in Limerick with several initiatives currently in train to progress the sector. For instance, Innovate Limerick's plan to develop a National Sports Business Cluster Limerick is intended to optimise on the success of Limerick's elite sporting facilities including UL's



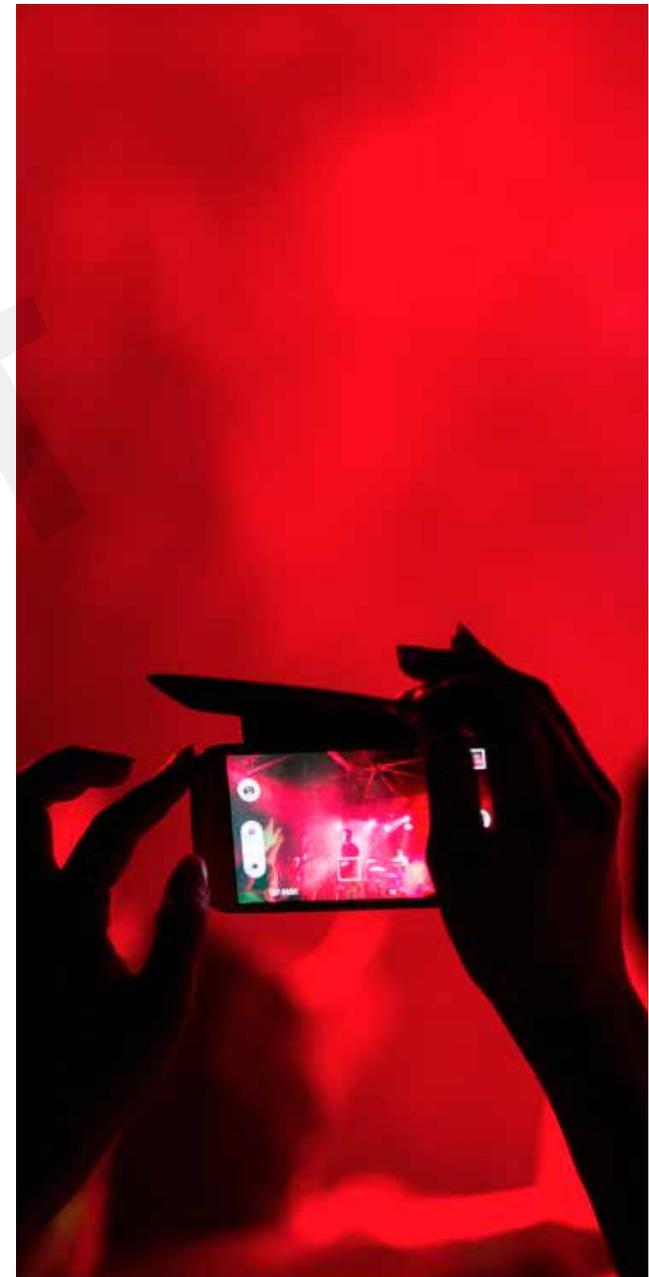
sports campus, LIT's Sportslab (Europe's leading strength and conditioning centre) in Thurles and the wide range of companies involved in other sports-related activities, from sports tech to nutrition companies based in Limerick.

Festivals, Events and Business Tourism

Successful events can bring significant direct economic and societal benefits while also providing a major opportunity to create a positive impression of the area, that can have far reaching consequences for the wider tourism industry. A report on the Festival and Events sector in Limerick published in Autumn 2016 as part of the Limerick Cultural Strategy 2016-2030 and Limerick Economic and Community Plan 2016-2018, found that there were 80 regular festivals and events across the county, cover 25 sectoral areas including music, poetry, literature and film. The audience for these events was in the region of 363,000 people. The sector is growing in Limerick with a 76% increase in funding secured for 2017 from Fáilte Ireland's Regional Fund for Festivals. The report highlighted wide ranging social, economic and cultural benefits that the sector can bring, and proposed a series of recommendations to grow the sector further which this tourism strategy endorses.

The calendar of events in the county includes both events of national stature down to smaller specialised or local events showcasing local activity. These events celebrate all that is great about the county with sports, food, music and dance featuring strongly. A selection of notable festivals and events held in Limerick is provided below. Many of these are well established annual or bi-annual events. Limerick has also been moderately successful in securing one off touring events with recent examples including the Global Karate Championships and the World BBQ Championship held in Limerick in October 2017.

Successful events can bring significant direct economic and societal benefits while also providing a major opportunity to create a positive impression of the area, that can have far reaching consequences for the wider tourism industry.



Festival	Date
International Band Championships	March 2017
West Limerick Drama Festival	March 2017
Michael Hartnett Annual Literary and Arts Festival	April 2017
Kilfenane Home of the Fleadh	June 2017
Riverfest	28th April - 1st May 2017
Fleadh by the Feale	27th April - 1st May 2017
Ballyhoura International Walking Festival 2017	28th April - 1st May 2017
Great Limerick Run	May 2017
Limerick International Food Truck Festival	1st - 5th June 2017
Bloomsday in Bruff	16th June 2017
21st Blas International Summer School for Irish Music and Dance	19th -30th June 2017
Limerick Sings International Choral Festival 2017	22nd -26th June 2017
Adare Garden Fete	July 2017
Foynes Air Show and Irish Coffee Festival	July 2017
Trés Court International Film Festival	9th -18th June 2017
Fresh Film Festival	April 2017
The Richard Harris Limerick Film Festival	October 2017
Twilight Racing	22nd July 2017
Askeaton Contemporary Arts Festival	July 2017

Festival	Date
Fusion Dance Fest 2017	Friday 25th & Saturday 26th August 2017
Mungret Music Festival	Saturday 26th & Sunday 27th August 2017
Limerick Agricultural Show 2017	Saturday 26th & Sunday 27th August 2017
The Knights of Westfest Festival	September 2017
Cruinniú na Cásca (national day of culture and creative)	17th April 2017
Culture Night	Friday 8th - Sunday 10th September 8th-10th
Elements Arts & Culture Festival	October/November 2017
Gerry McMahon Singing Festival	December 2017
Winterfest	December 2017
Pig and Porter Tag Rugby Festival	July 2017
Hearsay International Audio Arts Festival, Kilfenane	29th September – 1st October
Wellbeing days at Lough Gur	Ad hoc
Christmas in Limerick	December
Global Karate Championship	August 2017
World BBQ Championship	October 2017
Limerick Pride Festival	July 2017
Limerick Jazz Festival	September 2017
Paddy Dakar Motorbikes Charity Event	September 2017
EVA International Biennale Art festival	April – July 2018

Business Tourism

Business tourism is a fast-growing lucrative market segment which has continued to perform well even in difficult times. Ireland is regarded as being well positioned relative to value, individuality and a mid-range capacity for conferences and events. It contributed €669m to the Irish economy in 2015, accounting for 16% of overseas tourism spend. The type of events that Ireland predominately attracts includes conferences, corporate meetings, trade fairs and incentive trips.

The Shannon Region Conference and Sports Bureau, the official events bureau for Ireland's Shannon Region, has responsibility for attracting international conferences, sporting and culture events to Limerick and the wider Shannon Region. In 2016, these events brought over €7 million to the economy of the Shannon Region. Limerick has a good track record in attracting major conferences and events including close to 40 events in 2016 such as the Japanese Karate Association World Championship. However, the absence of a large, state of the art events/conference space in the city limits the full potential of Limerick to compete internationally.



Cultural Expression

Sports Centres of excellence

-  Thomond park
-  Swimming Pool (UL)
-  Pairc na nGael

Key Activities

-  Racecourse
-  Horse Riding
-  Skateboard park
-  Basecamp Action Adventure Park
-  Golf course/Pitch and Put
-  Mountain Bike Park
-  Outdoor Education Centre
-  Rock Climbing
-  Claybird and Archery Centre
-  Sailing
-  Off-road cycling
-  Kayaking
-  Fishing locations
-  Walking

Key Cultural Venues

-  Flying boat and Maritime Museum
-  Limerick City Gallery of Art
-  Adare Gallery
-  University Concert Hall
-  Dolan's Warehouse
-  The Hunt Museum

 Milk Market

 Theatres

Cultural Productions

-  Ballyhoura Ceramics
-  Orchard Pottery

Performance (festivals, events happenings)

-  EV + A International Art Biennale
-  Rambling houses
-  Fairy Trail
-  Band Championships
-  Fleadh by the Feale Traditional Music Festival
-  Riverfest
-  Michael Hartnett Annual Literary and Arts Festival
-  Ballyhoura International Walking Festival 2017
-  Great Limerick Run
-  Bloomsday
-  Foynes Irish Coffee Festival
-  Askeaton Contemporary Arts Festival
-  Cruinniú na Cásca (national day of culture and creative)





MOVING AROUND

Accessibility and intermodal connectivity will be an important aspect of the tourism strategy with measures to support and promote accessibility within the tourism framework of the county, in areas of strong visitor attractions and in identified areas of tourism development. At present, Limerick is a relatively well-connected and accessible place. An overview of the county's major road, rail, air and sea links is provided below.

**Air**

Limerick City is located just 20 minutes (19km) from Shannon Airport, Ireland's third busiest airport after Dublin and Cork.

Furthermore, the regional Kerry Airport at Farranfore, located just 32km and a 25-minute drive from Abbeyfeale, offers direct flights to six destinations including London-Stansted, London-Luton, Frankfurt-Hahn, Alicante, Faro and Dublin.

**Sea**

Ireland's second largest port operation, Foynes, specialises in bulk cargo handling more than half the cargoes using Irish Ports. A small number of cruise ships berth each year but the cruise industry is relatively undeveloped at the port. A 2016 review of the international cruise industry, 'State of the Cruise Industry Outlook' reported growth of 49% in Europe's cruise industry since 2008 with 23.19 million Europeans taking a cruise in 2015.

**Road infrastructure**

The road network in the county has been significantly upgraded in the last decade with improved facilities for pedestrians, cyclists and those with reduced mobility. The opening of Limerick Tunnel and the southern bypass has greatly strengthened connections between the National Roads and Motorway network that converge on Limerick city. The major urban centres of Dublin, Cork and Galway are all located within easy reach with journey time to Galway significantly reduced with the opening of the new M18 Motorway

**Rail**

As a transport mode for tourists wishing to travel to different destinations throughout the County, the rail system has limited impact with just two stations located in the county – Colbert Station in Limerick City and Castleconnell. A €17 million transformation of Colbert Station Plaza has greatly enhanced the quality of the public realm surrounding the station creating a positive first impression for visitors arriving in Limerick at this transport node. The south-eastern part of the county has easy access to Limerick Junction station, just over the border in Co. Tipperary. Approximately 2,500 rail passengers pass through Limerick's Colbert train station every day travelling on the four rail routes that serve the City: Dublin–Limerick, Limerick–Nenagh–Ballybrophy and Limerick–Ennis–Galway lines. Connections for Cork, Clonmel, Carrick-on-Suir, Waterford and Kerry stations including the tourism hub of Killarney, and Farranfore and Tralee can be made at Limerick Junction. There have been calls to reinstate the Limerick to Foynes railway line for freight and potentially tourism initiatives such as a steam train linking Adare to Askeaton and Foynes. This was included as a key action in the Shannon Foynes Port Company's Masterplan 'Vision 2041', which recognises the significant benefits that the reinstatement of the railway line between Limerick and Foynes could present.



Bus Éireann

Bus Éireann operates a city bus service connecting key destinations via seven routes serving the city centre, hospitals, schools, shopping and tourist attractions such as Kings John's Castle and the Hunt Museum. There are 18 routes on the wider county bus service which varies in terms of frequency with some areas dependent on a very limited service.

Bus Éireann also offers day tours of Ireland's Ancient East and the Wild Atlantic Way – promotional material for these routes does not highlight the Limerick destinations of Foynes (Wild Atlantic Way) or Lough Gur (Ireland's Ancient East). Tourists can also purchase an Open Road Ticket, a hop on/hop off ticket valid for all Bus Éireann services.



Local Link

A public bus serving rural areas of South East Limerick and North Cork is available with 7 routes in operation. Local Link is primarily a community service addressing unmet transport needs



Private Guided Tours

Chauffeur services and private driver sightseeing tours often include Limerick City as an overnight stop-over base for exploring the wider mid-west region. King John's Castle, St. Mary's Cathedral, the Hunt Museum and the Treaty Stone are some of the local attractions offered as part of tours. Day trips on offer typically advertise one or two destinations in Limerick, usually located in Limerick City and Adare, combined with an attraction in a neighbouring county such as Bunratty Castle. Local private tour operators include Retro Ventures offering the private hire of classic cars & motorbikes.



Cycling and Walking

An overview of the cycling and walking routes available in Limerick was provided earlier. These include the off-road Ballyhoura Mountain Bike Trail and the Great Southern Greenway Limerick. The Condell Road Riverside Trail is a 1km off road cycle path that runs along the banks of the River Shannon offering scenic views of the city. There is also the Park Canal walking and cycle route that runs to Athlunkard Bridge on the northern fringe of the city centre. The Riverside loop is a 4km cycle trail that starts at the Strand Hotel and takes in some of the city's key attractions such as King John's Castle, the Hunt Museum and the City Quays. Cycle paths are also available along key entry points to the city.



Moving Around

 Shannon Airport/ *from Limerick City 20 min. drive time*

 Rail Line

 Train Stations

 Ports

 National bus route hub

 National Roads

 Motorways

Drives and Trails

 Ballyhoura Way

 Broadford-Ashford

 Great Southern Greenway

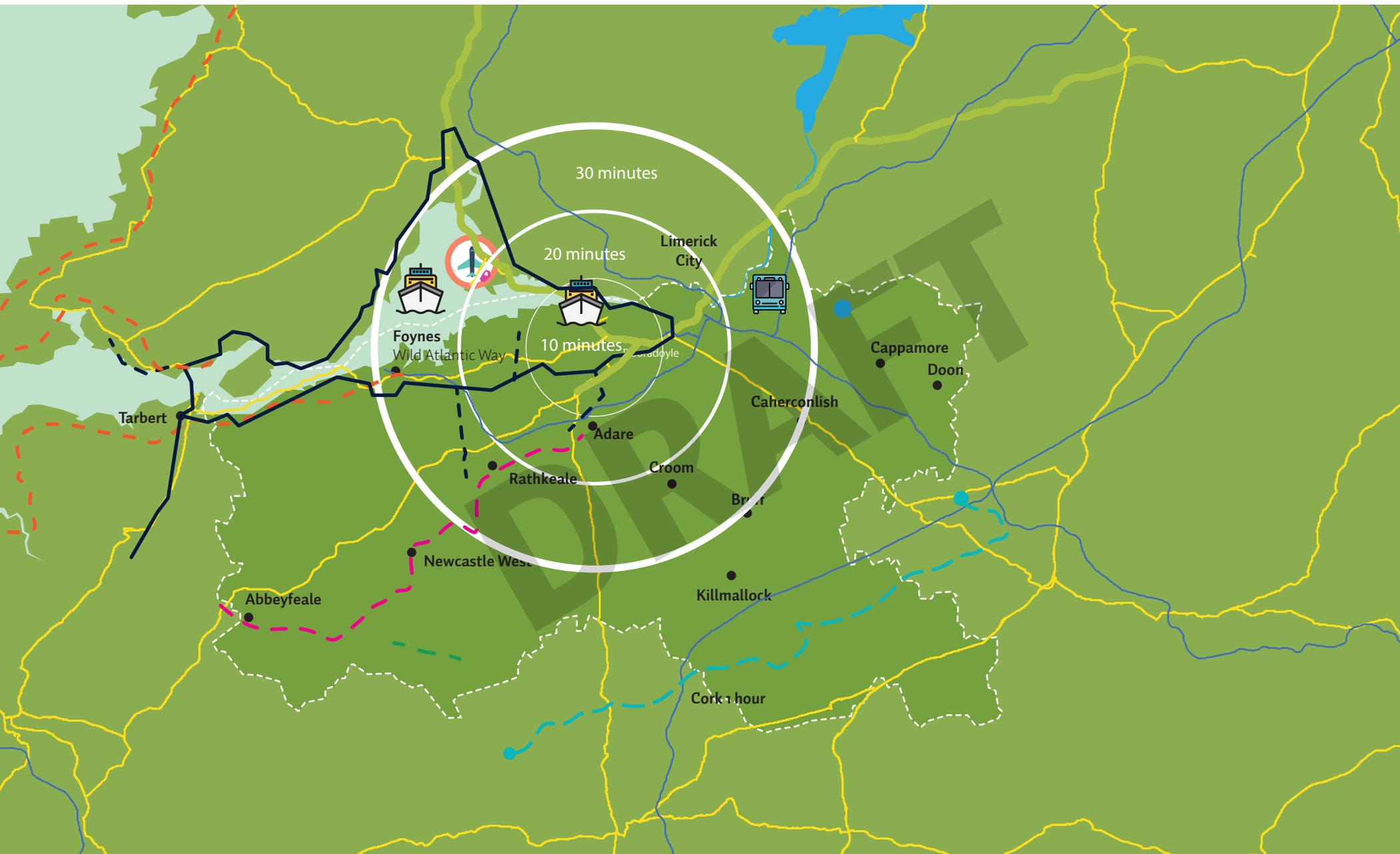
 Attychraan loop

 Clare Glens loop

 Shannon Estuary Way / WAW loop

 Wild Atlantic Way





Encouraging and Supporting the Visitor in Moving Around - On the ground

There is a need for finer grained information and orientation for visitors both in Limerick City and across the county. This information is currently presented across a range of publications available online or in print from Tourist Information Centres and in some locations across the county. Below is a sample of the current material available to visitors.

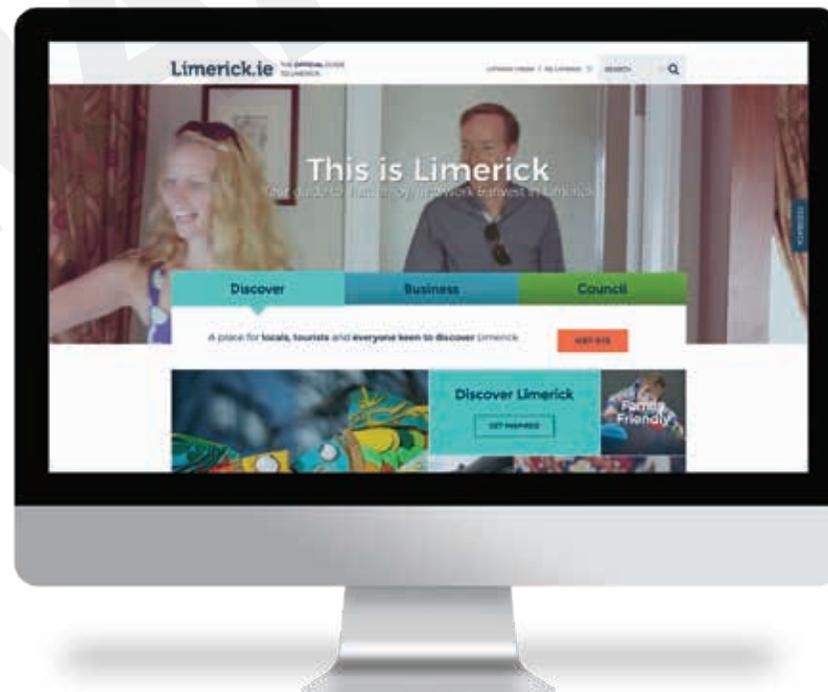
In recent years, there have been several programmes to enhance the presence and quality of interpretative signage at strategic locations and sites around the county. A wide range of print media such as flyers and brochures are available for different regions across the county e.g. the visitor guide prepared by West Limerick Tourism is an excellent reference point for anyone wishing to explore the heritage sites of West Limerick.

Encouraging and Supporting the Visitor in Moving Around - Online

The revamped Limerick.ie website, launched recently by Limerick City and County Council, provides a 'one stop shop' for information on living, working, visiting and doing business in Limerick. The website presents a comprehensive and engaging overview of the city and county. The site is structured around three pillars – Discover, Business and Council. The 'Discover'

pillar is designed to appeal to both residents and visitors with a contemporary, colourful and easily navigable user interface. The county is described in terms of 'What's On', 'Eat, See & Do', 'Explore', 'Visiting', 'Living' and 'Learning'. These pages have extremely clear and easy-to-follow drop down menus that allow the user to quickly access information on the huge range of activities, services and facilities offered across the county. The 'Explore' section of the website showcases the many 'hidden gems' waiting to be uncovered in Limerick, enticing the reader to discover more through photographic displays of Limerick's picturesque towns, villages, and

countryside. The website contains everything that is needed to plan a trip with a recommendations section, travel guides for 48 hours and 24 hours in Limerick, information on accommodation providers, and all attractions classified by theme – food and drink, history and heritage, arts and culture etc. The website has successfully integrated content from over 15 sites into one easily accessible and user friendly platform. It represents a best in class digital platform that is multi-purpose in nature, acting as a guide for residents, businesses and visitors to all that Limerick has to offer.





Appendix 3

Case Studies

Theme 1 – Into the Blue (Waterways)

Shannon Blueway

The Shannon Blueway is a series of land and on-water based trails 200km in length along the River Shannon stretching from Lough Allen to Lanesborough, County Leitrim. Part of it comprises of a 600m floating boardwalk on Acres Lake near Drumshanbo, County Leitrim, costing €500,000 to complete. The boardwalk is the latest addition to Ireland's expanding network of recreational trails which offer walking, kayaking, paddling and cycling routes in many lesser-known areas of the country. The Blueway links to the Boyle River just above Carrick-on-Shannon, allowing access to Lough Key and its adventure playground, as well as the town of Boyle in County Roscommon via Boyle Harbour.

Going south from Carrick-on-Shannon, the Shannon Blueway winds its way through lakes and rivers to the Camlin River and Richmond Harbour in Clondara, County Longford, where the Royal Canal offers access all the way to Dublin. Along the way is a range of 'slow tourism' facilities and destinations, including 'glamping' at Beirne's in Battlebridge and zipway, Segway and camping facilities in Lough Key Forest Park.

1



Liverpool Docklands

The most recent plan in the £11 billion investment programme for the regeneration of Liverpool that is set to create 40,000 new jobs over a ten year period focuses on a 125 acre site in the former docklands area. The vision for the Ten Streets district which currently comprises a mix of historic dock warehousing and industrial buildings is to create a vibrant creative quarter that will drive future prosperity and enhance Liverpool's status as an international destination. A Masterplan for the area unveiled in early 2017 include plans for a major performance venue and a revolving auditorium. This project is expected to generate in excess of 2,500 new jobs. Like Limerick, Liverpool is a highly cost competitive city and is well placed to attract foreign direct investment and UK based companies as part of the growing digital and creative businesses

sector. The Ten Streets district will be a place where tech companies, digital businesses and creative enterprises thrive alongside artistic organisations to create an exciting dynamic and distinctive new neighbourhood. The Masterplan, which is designed to align with smart city principles and be exemplar in the use of renewable energy, also includes several new public squares and spaces. Other projects taking place as part of the regeneration programme include a Knowledge Quarter, the Liverpool Science Park and the regeneration of Festival Park – a 90 acre site for which a mixed user regeneration project to include a major leisure destination close to the river and a green transport corridor, are currently at feasibility assessment stage.



Figure 1 The Ten Streets District of Liverpool (Concept Plan)

Het Eilandje, Antwerp

Het Eilandje (the islet/small island), is an area positioned between Antwerp's city centre and the new sea-port. It is situated in the former industrial docklands area, which similar to other docks in European cities, has seen a dramatic loss of traditional industry which has left empty and abandoned buildings in its wake. The area has seen massive regeneration, particularly within the last two decades, and now positions itself as a cultural quarter within Antwerp, to rival any of the city's other more traditional cultural locations. The area now houses a modern art museum, the MAS, which has in turn led to further creative industries and galleries flocking to Eilandje. These new galleries (Red Star Museum) embrace the area's maritime heritage and often renovate disused buildings, while others, such as MAS, have been purpose built and provide a dramatic contrast with the more traditional structures. The area now has an entirely new identity, with Michelin star restaurants, independent cafes and boutique stores finding a home there. In turn, these developments have seen an influx of tourists to the area, as well as an increase in the numbers of

Antwerp residents who flock there. One of the major successes has been the Red Star Museum, which is located in the former warehouses of the shipping company of the same name. The museum showcases work based around the idea of migration, in-line with the primary business of the former Red Line shipping company. In terms of revenue, the museum generates direct income of more than €1 million per year, with 10% of visitors foreign tourists, and this share is increasing. The museum generates a flow of 500 to 1000 visitors each day, and regularly hosts private night events which attract further numbers. This is just one museum. Others, particularly the MAS, have also proved hugely popular since their opening. Private investors have begun to acquire old buildings around Het Eilandje, seeking to capitalise on the clear success and reinvigoration brought to the area thanks to these cultural initiatives.

RED STAR LINE



Hull UK City of Culture 2017 – Revealing Hull’s Heritage

Kingston-upon-Hull, commonly called Hull, is a city in East Yorkshire. It was one of England’s most important port cities. The Port of Hull continues to buzz today, with some of the largest super ferries in the world operating from Hull. Regeneration of the port was spearheaded in 2001 when an aquarium, The Deep, opened in Hull – the world’s only submariun. The beginning of the 21st century saw several other parts of Hull regenerated, too. The St Stephen’s Shopping Centre opened in 2007, as well as developments such as the Humber Quays business district and C4DI, a centre for digital innovation in the north. Over 5 million annual visitors contribute almost £210 million to Hull’s economy (Yorkshire Forward, 2017).

The arts and cultural sector is now going from strength to strength in the city, with events such as the Freedom Festival thrilling audiences each year with an incredible programme of theatre, music, comedy and poetry. The Ferens Art Gallery is the region’s leading visual art space, and will reopen after refurbishment in January

2017, before hosting the Turner Prize later in the year. A new contemporary art space, Humber Street Gallery, opens its doors for the first time in January 2017. Hull Truck Theatre presents new productions and touring work from around the country, and Hull New Theatre is currently undergoing a massive transformation, ready to showcase more world-class performances later in 2017.



NDSM Amsterdam

The former NDSM Amsterdam ship wharf is a stunning hangout located in Buiksloterham just 10 minutes by free ferry. The area was once home to NDSM, the largest shipbuilding company in the world but the ship building era came to a demise in the mid 1980s. Over time, the empty buildings were occupied by craftsmen, artists, who formed a foundation called the Kinetisch Noord. The city council like the idea of this new so called 'broedplaats' ('breeding grounds'). Kinetisch Noord now receive subsidies from the Amsterdam City Council to further develop the area and make good use of the large boathouse, the huge outside terrain and ramps. Many historical buildings previously in use for shipping manufacturing ships have been successfully converted to accommodate a range of creative enterprises, restaurants, bars, and recreational uses including a large skating park.



Theme 2 – Energy Unleashed

Great Western Greenway (Activities)

The Great Western Greenway is a walkway and cycleway in County Mayo. It runs for 42 kilometres along the abandoned rail line from Westport to Achill, alongside Clew Bay and passing through the towns of Newport and Mulranny. The route forms part of the National Cycle Network and it is the longest off-road walking and cycling trail in Ireland. The route opened in three phases: the first 18km track opened between Newport and Mulranny in 2010 and the second phase 13km section between Mulranny and Achill and the third phase 11km Westport to Newport section both opened in 2011.

Close to the greenway, there are numerous attractions including Westport House, Croagh Patrick, the Ceide Fields, a Deserted Village on Achill Island and Ballycroy National Park. The trail has been named as the Irish winner of the European Destination of Excellence Award. An estimated 300 people cycle and walk the trail

each day, which was constructed at a cost of €5.7 million. The route was co-funded by the Department of Transport, Tourism and Sport, Fáilte Ireland and Mayo County Council. An economic assessment carried out on the project estimated that 40 jobs were created and another 50 retained in the local economy as a result of the investment.



Theme 3 – Medieval Strongholds

Úbeda, Andalusia, Spain (Heritage)

Úbeda is a city of 34,400 people, situated 330 km south of Madrid, Spain. The city was founded in 822 AD and is considered to be one of the finest examples of a Renaissance city in Europe. The city comprises of two parts: an old and new town, with the old town being granted UNESCO World Heritage status in 2003. An ongoing issue for Úbeda is balancing the demands of the internationally important old town with the needs of the much larger and more modern area. There is significant potential to promote the UNESCO site more widely to the European cultural tourism market.

In expanding its tourism offering, the local municipality focused on recovering public spaces and reinforcing the heritage quality of the old town by increasing the value of the extensive public spaces within the 89 hectare World Heritage Site. One of the key challenges in doing so was to find new uses for old buildings such as former palaces and abandoned buildings and to manage visitors in such a way as to avoid overcrowding and the associated problems

evident in other Spanish historic cities. While visitors would be clear beneficiaries, it was of equal importance to secure social, cultural, economic and environmental benefits for local citizens. The population of the old city increased to 4000, a 3% increase, and there was increased investment in surrounding buildings and in the regeneration of historic centre generally. The restoration project demonstrates the wider contribution that investment in the public realm can bring to the overall regeneration of historical centres, acting as a catalyst for investment in surrounding buildings and improving the quality of life of the area for both locals and visitors.

3



Theme 4 – Alive and Kicking (Arts and Culture)

Events/Conference Centre, Battersea Evolution, London, United Kingdom

Events/Conference Centre, Battersea Evolution, London, United Kingdom Battersea Evolution is a purpose-built events venue situated in the centre of Battersea Park, London. The centre comprises 4,000m² of totally modular event spaces that can be adapted to cater for all types of events and conferences including meetings, exhibitions, concerts, charity fundraisers, gala dinners, trade shows, creative, corporate, public and private events. The centre offers great flexibility, with a large outdoor space allowing for free crew and truck parking next to the venue. The main events space comprises 3,750m² floor area and there is also an atrium space, mezzanine level and a large

kitchen / back of house space. Central to the success of Battersea Evolution is the versatility of the space and its adaptive capacity for all types of events/conferencing occasions.

The London's event leisure tourism directly contributed £2.8 billion to the city's economy in 2015 and supported over 27,000 jobs²⁵.

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²⁵ London & Partners (2015) The Impact of Event Tourism on London's Economy. Available at: http://files.londonandpartners.com/l-and-p/assets/events/event_tourism_report.2016.pdf



Strasbourg Convention and Exhibition Centre, France

The recently redeveloped Strasbourg Convention & Exhibition Centre incorporates both a Convention Centre and an Exhibition Park. The convention centre comprises 3 auditoriums, meeting rooms and 10 000 m² of modular space. The 24,000m² Exhibition Centre

provides a dynamic easily adaptable space to cater for professional and public events of any size. The multi-purpose centre was developed with the purpose of making Strasbourg a major destination for business and event tourism in Europe.

DRAFT



The Holzmarkt, Berlin

The Holzmarkt (literally meaning 'wood market') is a development located between Berlin's Ostbahnhof train station and the River Spree in the German capital. It was formerly an urban wasteland and had been earmarked for high rise development with luxury hotels, apartments and offices. When the development proposals for the site did not transpire, the area was re-imagined to emerge as a cultural quarter in the heart of the German capital. The quarter is most notable for its urban eco-village feel with recycled windows, second hand bricks and scrap wood, containing among other things a studio for circus acrobats, a children's theatre, a cake shop and a nursery where parents can drop off their children while they go clubbing next door.

The development is the result of an unprecedented experiment in a major world capital: allowing a new quarter to be built by the nightclub owners who put on the best parties in town rather than the highest bidding property developers. The cooperative who manages the Holzmarkt created a long-term, lively place where structures are created that promote change and small-scale development. The Holzmarkt sees itself as a springboard to the independent success of tenants. Their premise is that infrastructure and services are used as much as possible, saving resources in every respect.



DRAFT

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