

# LIMERICK TOURISM DEVELOPMENT STRATEGY

## *Situation Analysis Report*

2019-2023

Produced By



In partnership with





***Limerick Tourism Development Strategy  
Situation Analysis Report  
2019-2023***

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# 1.0 Introduction

## 1.1 LIMERICK TOURISM LANDSCAPE

The Limerick Tourism Development 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.

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 historic 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 Ireland's Hidden Heartlands.

## 1.2 PURPOSE OF THIS STUDY

Tourism is a critical pillar of the Irish economy generating over **€8.8 billion in total revenue in 2017. The sector supports in the region of 205,000 jobs**, and with the success of experience propositions such as the Wild Atlantic Way and more recently, Ireland's Ancient East and Ireland's Hidden Heartlands, 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 **€307 million with close to 931,000 visitors to the county in 2017**. The sector is hugely important to Limerick, yet comparatively the county is underperforming, particularly so in relation to tourism hotspots and neighbouring counties.

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. This Situation Analysis Report outlines the baseline analysis that underpins the priority themes and associated transformational actions that are proposed in the accompanying tourism strategy. Together these provide a framework to drive forward the tourism 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.

## 1.3 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, Templeglantine, 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 these workshops, the participants, and participants who attended is provided in the Workshop Outcomes Report. 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 delivery.

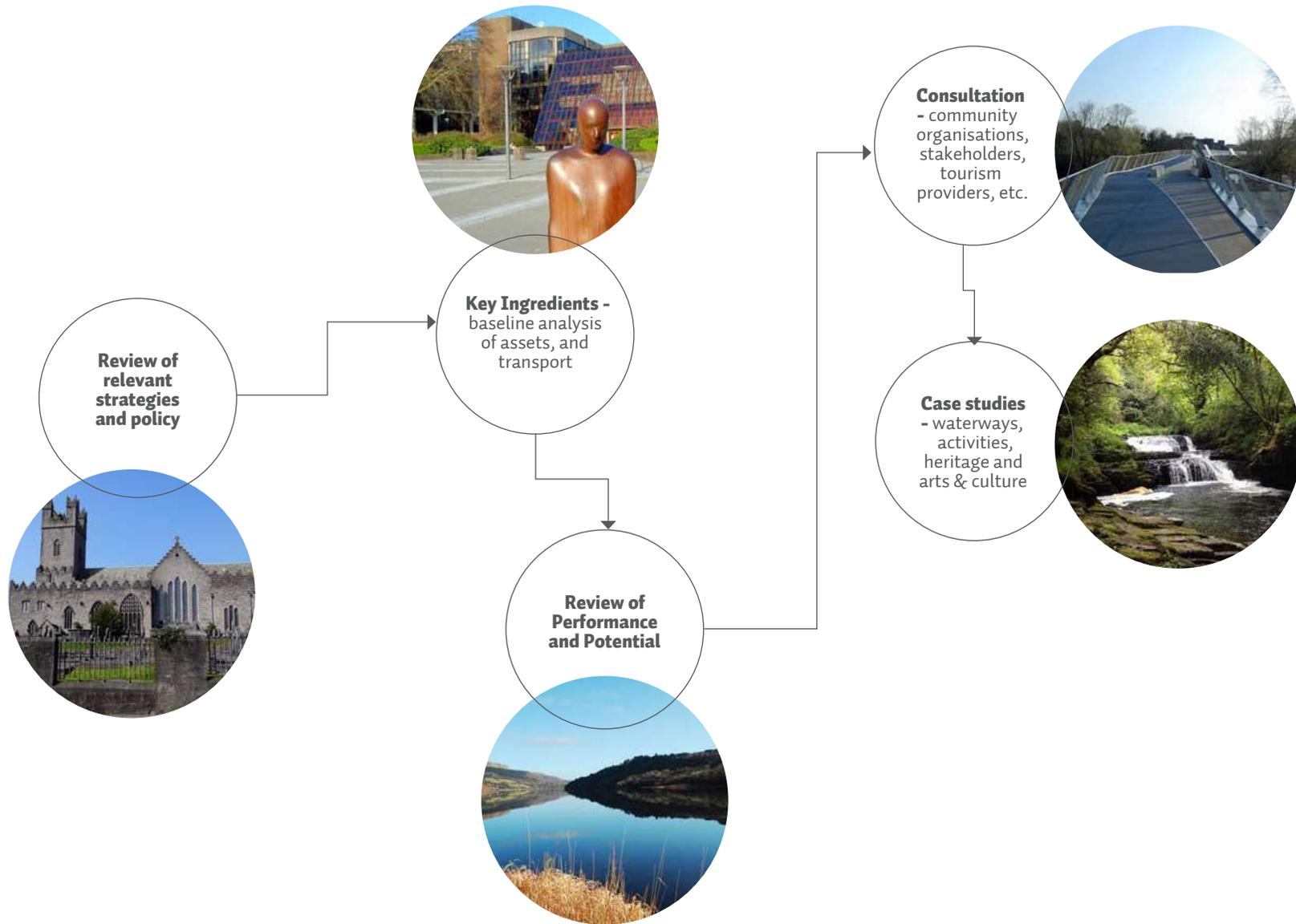


Figure 1 Limerick Tourism Development and Marketing Strategy – The Process

## 2.0 Building on the Good Work Done

The wider policy context in which the Limerick Tourism Development 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, and the strategic documents such as the Limerick Regeneration Framework Implementation Plan.

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 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 statement objectives including increasing both domestic and international visitors to Limerick, encouraging visitors to stay for a longer duration, developing diverse tourist experiences and working with all relevant stakeholders to expand the tourism industry in Limerick.

The Limerick Tourism Development Strategy sits amid a wider strategic policy backdrop that includes major national tourism initiatives such as the Wild Atlantic Way; (Limerick sits in the Wild Atlantic Way Region); Ireland's Ancient East and Ireland's Hidden Heartlands; all of which neighbour Limerick.. There are also a myriad of tourism plans and initiatives that direct activity on a localised scale within the city and county.

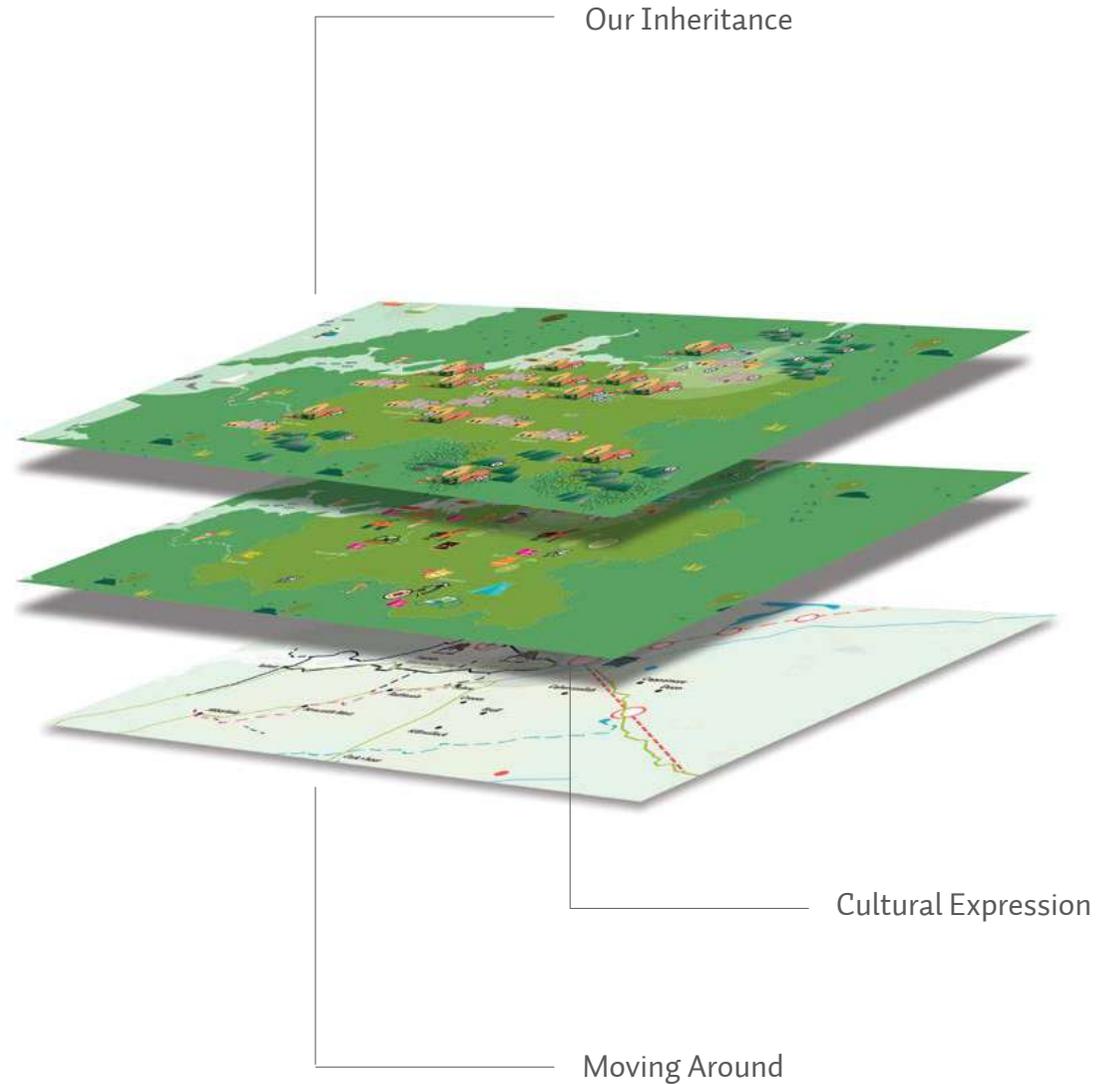




## 3.0 The Key Ingredients

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**).





## 3.1 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 can 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<sup>2</sup> 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.

*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.*



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.



## History and heritage

The built heritage inheritance has formed a cornerstone of Limerick's tourism approach to date, however, it needs 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 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, Abbeyfeale and Bruree.

*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.”*

Adare 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
17. Bleach Lough



### Parks, gardens and natural sites

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



### Medieval towns; castles and conquests, saints and scholars

29. King John's castle  
King's Island  
St. Mary's Cathedral
30. Glin castle
31. Desmond Castle  
Franciscan Friary
32. Desmond Banqueting  
Hall and Castle
33. King's Castle and  
Dominican Priory
34. Desmond Castle  
Augustinian Priory  
Franciscan Abbey  
Trinitarian Abbey
35. Desmond tower house  
Augustinian Abbey
36. Purt castle
37. De Lacy castle
38. Glenstal Abbey
39. Knockfierna Famine House
40. Glenquin Castle
41. Mungret Monastic complex
42. Carrigogunnell Castle
43. Dromore Castle
44. Shanid Castle
45. Springfield Castle
46. Beagh Castle
47. Kilmallock Dominican Abbey  
and walled town

### 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 – Kilronan 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.



## 3.2 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.

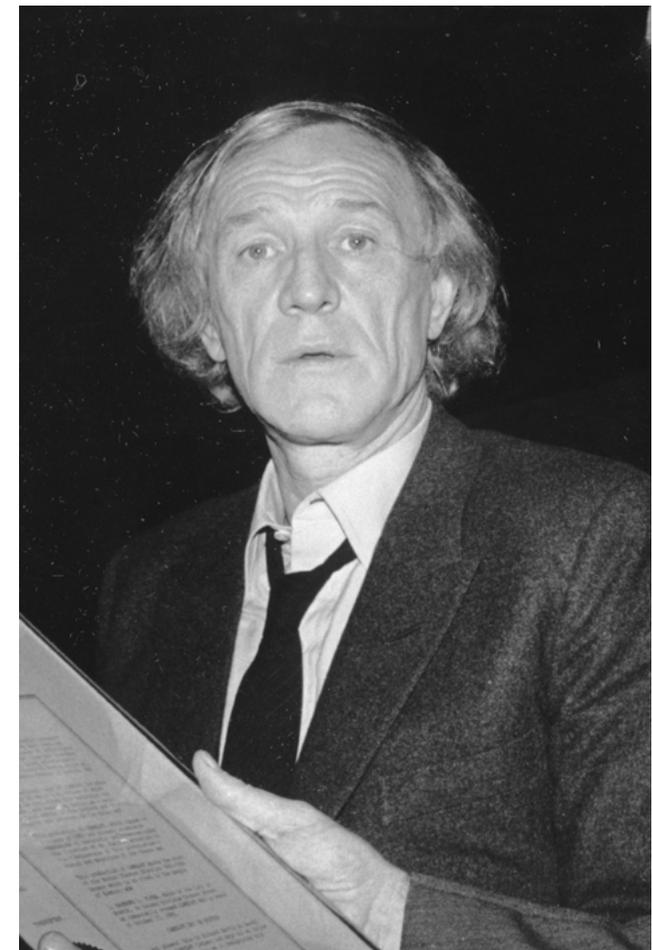
This is a hugely important aspect of Limerick's tourism offering and covers cultural legacies such as traditional music and story-telling, as well as the very much alive and kicking current arts scene which encompasses music, literature, dance, theatre, architecture, public, sculpture, digital, spoken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

#### 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 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, and raft building are just some of the water based activities on the River Shannon and the Shannon Estuary. 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

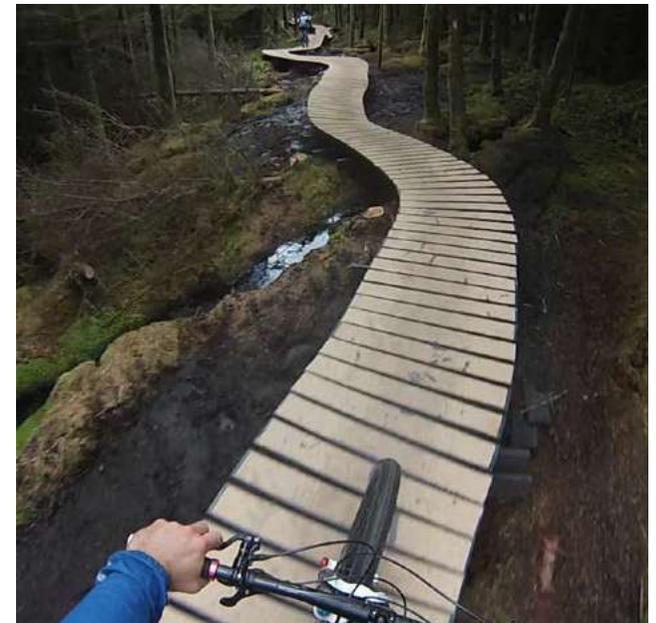
The wider county of Limerick offers a vast choice of activity based holidays to adventure seeking tourists. Activities likely to appeal to families and young people in West Limerick include paintballing at Basecamp Action Adventure Park, Shanagolden, StoneHall visitor farm and wildlife park at Curraghchase and Outdoor Karting in Kilcorman.. 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. For those keen on long-distance running the Great Limerick Run offers 6 mile, half marathon and full marathon courses and is increasingly popular - it is now the biggest mass participation sporting event outside Dublin.





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 new Golf Course at Adare Manor opened in April 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.

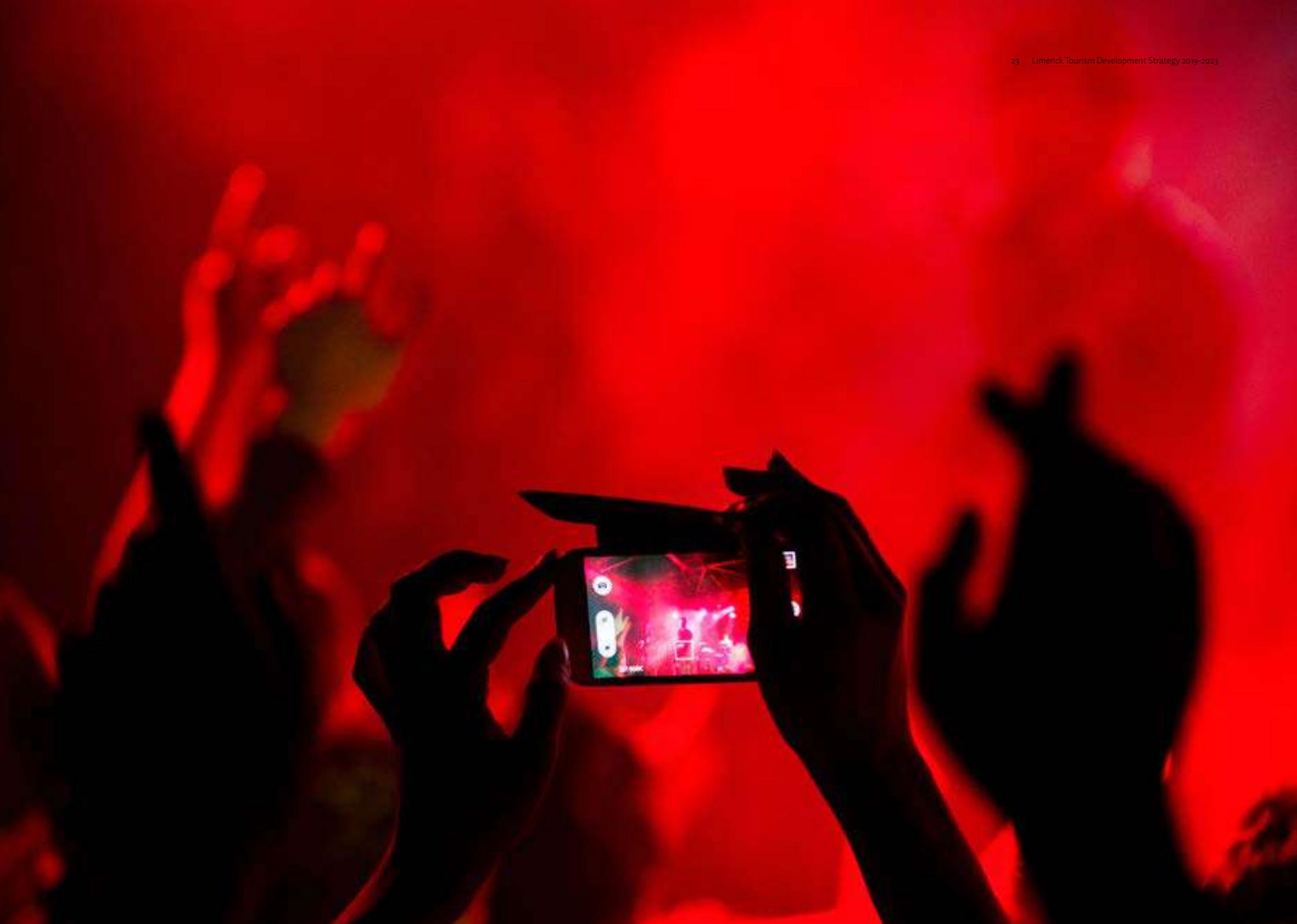
## Other sports and recreational activities

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 (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 at Tory Hill farm, Croom, Co. Limerick.





## 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
-  Galtymore Mountain (917m)
-  Rock Climbing
-  Claybird and Archery Centre
-  Sailing
-  Off-road cycling
-  Kayaking
-  Fishing locations
-  Walking
-  Walking Trails

### Key Attractions

-  Flying boat and Maritime Museum
-  Limerick City Gallery of Art
-  Adare Gallerie
-  University Concert Hall
-  Dolan's Warehouse
-  The Hunt Museum
-  Palatine Museum
-  Old Irish Ways Museum
-  Lough Gur Visitor Centre

-  Terra Nova Gardens
-  Curraghchase Forest Park
-  Ballyhoura Apple Farm
-  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)
-  11 West Limerick Drama festival
-  12 Garry McMahon Singing Festival
-  13 Eigsé Michael Hartnett Literary and Arts Festival
-  14 Foynes Air Show





### 3.3 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.**



#### 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.



## 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 2017 record 1.75 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 400,359 flying through Shannon from its five American destinations – JFK New York, Newark, Boston, Chicago and Philadelphia airports. This represents a 0.8% increase on 2015 figures. Currently, the UK market is weakening, with a 4.1% decrease in passenger numbers between 2016 and 2017. 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 desired growth. From the perspective of business tourism, a market that is particularly important for Limerick, 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.



## Moving Around

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

 Rail Line

 Train Stations

 Ports

 National bus route hub

 National Roads

 Motorways

 M7

### Drives and Trails

 Ballyhoura Way

 Broadford-Ashford

 Great Southern Greenway

 Attychraan loop

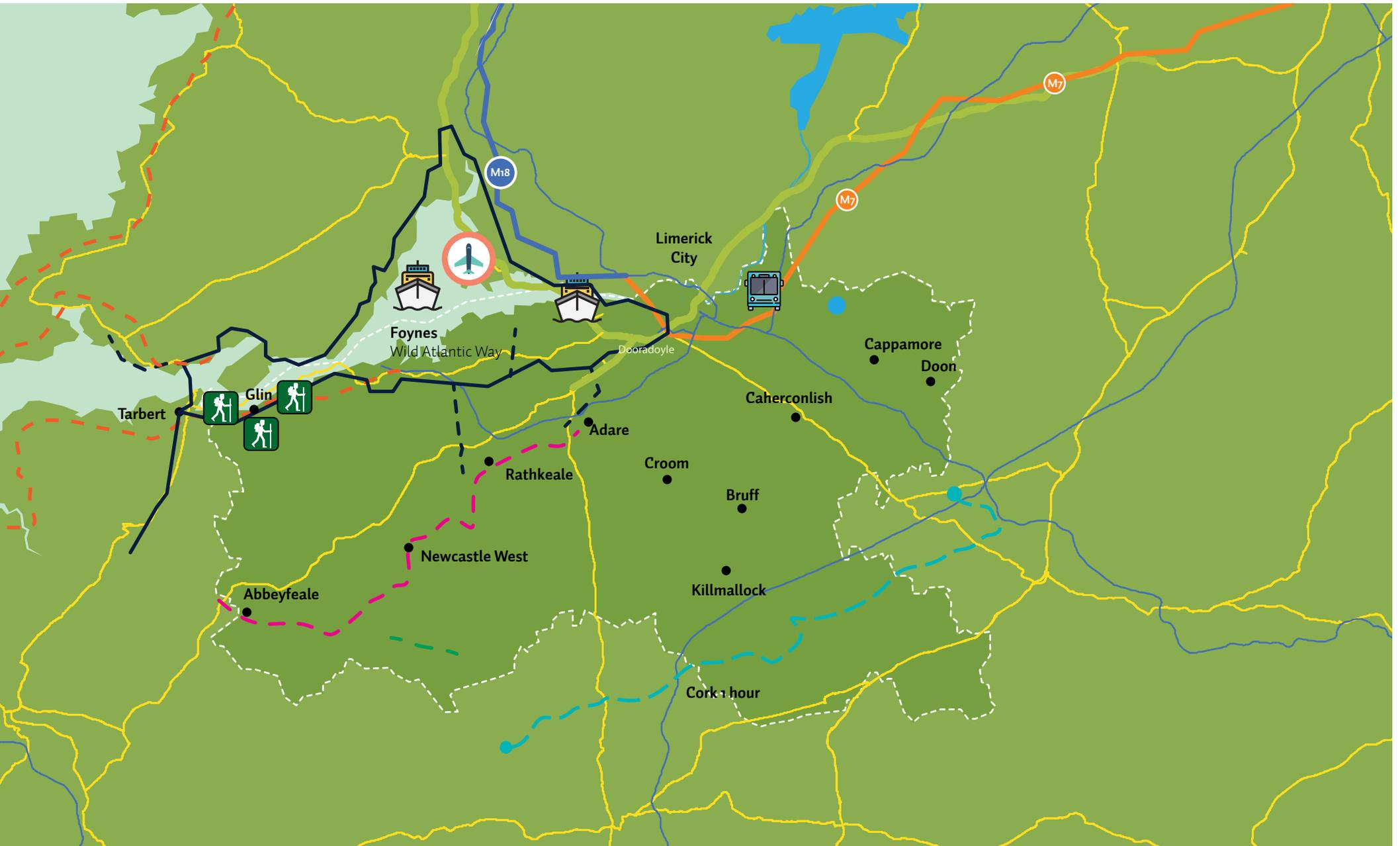
 Clare Glens loop

 Glin Walking Trails

 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.





# 4.0 Performance and Potential

## 4.1 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 follows<sup>1</sup>:

- Every €1m of tourist expenditure helps to support 27 tourism jobs
- 1,000 additional tourists support 20 jobs in the tourism industry

Between 2013 and 2017, the total number of overseas tourists to Ireland increased by approximately 35% to just over 9 million visitors in 2017 (Table 1). In terms of domestic trips, a growth rate of approximately 14% on 2013 levels was recorded for 2017 when over 9.6 million trips were taken by Irish residents within the Republic.

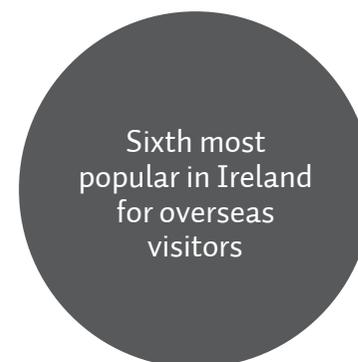
In 2017, out-of-state<sup>2</sup> tourist expenditure amounted to €5.3 billion. With a further €1.6 billion spent by overseas visitors on fares to Irish carriers, total foreign exchange earnings were €7 billion. With domestic tourism expenditure generating €1.9 billion, tourism is a €8.8 billion industry in Ireland.

## 4.2 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 €307 million with 931,000 visitors to the county in the year 2017. This represents 3.5% of the total tourism expenditure for the State for that year. Cork’s contribution for the same year was 9.4%, with Kerry accounting for 6.1% of national share and 2.8% attributable to Co. Clare.

### 4.2.1 OVERSEAS VISITORS

Limerick was the sixth most popular county in Ireland for overseas visitors in 2017 attracting 647,000 tourists to the area (accounting for 7.2% of all trips from overseas visitors). In revenue terms, this amounted to €261million<sup>3</sup> or an average spend per tourist of €403.40 per trip. The number of trips taken by overseas tourists to each county along the western seaboard between the years 2013 and 2017 is presented in Table 2. During this five-year period, 2,666,000 overseas tourists visited Limerick. While the notable year on year increase is positive, this represents just 9.4% of total overseas trips to these counties during this time.



Numbers (000s)	2013	2014	2015	2016	2017
<b>Total Overseas</b>	6,686	7,105	8,036	8,742	9,023
<b>Domestic Trips</b>	8,413	8,991	9,125	9,359	9,626

Table 1 National Tourism Numbers 2013-2017

<sup>1</sup> Fáilte Ireland (2018) Tourism Facts 2017

<sup>2</sup> Ibid. Out of State includes Britain, Northern Ireland, Mainland Europe, North America and Other Overseas

<sup>3</sup> Fáilte Ireland (2018) 2017 Topline Tourism Performance by Region

Overseas tourists 2017	2013	2014	2015	2016	2017	Total 2012-2015 (€million)
<b>Cork</b>	1,228	1,542	1,449	1,377	1,605	7,201
<b>Kerry</b>	877	1,040	1,026	1,076	1,277	5,296
<b>Limerick</b>	420	494	537	568	647	2,666
<b>Clare</b>	485	561	597	635	749	3,027
<b>Galway</b>	1,028	1,235	1,354	1,449	1,673	6,739
<b>Mayo</b>	218	259	302	309	324	1,412
<b>Sligo</b>	133	159	186	184	173	835
<b>Donegal</b>	199	252	289	283	255	1,278

Table 2 Overseas Tourists (000's) Numbers by County

Interestingly, the revenue generated by overseas tourism in Limerick (€1,001,000) far exceeded that which was recorded for Clare (€645m) for the same period despite higher visitor numbers to this county (Table 3). 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. 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 policy<sup>4</sup> which advocates a change in focus from overseas visitor numbers to overseas visitor revenue.

Table 3 Overseas Revenue 2017	2013	2014	2015	2016	2017	Total 2012-2015 (€million)
<b>Cork</b>	433	550	558	579	631	2,751
<b>Kerry</b>	183	228	234	270	337	1,252
<b>Limerick</b>	136	169	212	223	261	1,001
<b>Clare</b>	94	128	127	138	158	645
<b>Galway</b>	308	350	475	455	589	2,177
<b>Mayo</b>	60	68	80	68	78	354
<b>Sligo</b>	44	43	51	48	45	231
<b>Donegal</b>	63	67	83	90	82	385

Table 3 Overseas Tourist Revenue (m)

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

## 4.2.2 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 284,000 trips by Irish residents in 2017 – falling significantly short of the performance of its counterparts along the western seaboard and highlighting the substantial scope that exists to improve Limerick’s performance on the domestic tourism front.

Between the years 2013 and 2017, there were 1,253,000 domestic trips to Limerick (Table 4). This represents just 5.8% 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 9.6 million trips taken by Irish residents within the Republic in 2017, Limerick’s share was just 3%<sup>4</sup>. This compares with 11.6% share held by Cork, 10% share held by Kerry and 3.8% 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 80.3% of these in 2017.

Expenditure arising from 2017 domestic resident trips to Limerick totalled €46 million or a €161.97 spend per resident trip. For the years 2013-2017, the total spend by domestic tourism trips to Limerick was €179.9 million (Table 5). This compares to

Irish residents’ trips by county (000s)	2013	2014	2015	2016	2017	Total 2013-2017
Cork	902	973	967	944	1,113	4,899
Kerry	823	862	779	708	964	4,136
Limerick	271	253	257	188	284	1,253
Clare	347	388	410	388	362	1,895
Galway	834	916	895	720	1,024	4,389
Mayo	458	524	463	385	503	2,333
Sligo	207	223	263	242	247	1,182
Donegal	313	329	314	300	376	1,632

Table 4 Irish Residents Trips - Numbers of Trips (000's) by County Visited 2013-2017

€445.7 million in Clare and €978.5 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 (with the exception of Sligo) explains the difference in revenue levels in part, the spend per resident trip for Limerick is substantially lower than in other counties. For instance, in 2017 Irish resident visitors to Kerry spent an average of €213 per trip, visitors to Clare spent in the region of €238, the average spend amounted to €241 for visitors to Galway, while Irish visitors to Mayo generally spent around €215 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%

2018 YTD June? % from trending.ie

<sup>4</sup> Fáilte Ireland (2018) Tourism Facts 2017

Total domestic expenditure (€million)	2013	2014	2015	2016	2017	Total 2013-2017
<b>Cork</b>	150.9	171.3	171	180.3	202	875.5
<b>Kerry</b>	200.7	198.4	202.8	171.6	205	978.5
<b>Limerick</b>	37.4	39.2	32.1	25.2	46	179.9
<b>Clare</b>	87.2	83.2	101.2	88.1	86	445.7
<b>Galway</b>	150.7	201	194.1	143.4	247	936.2
<b>Mayo</b>	109.6	118.6	93.3	84.5	108	514
<b>Sligo</b>	42.2	43	61.2	39.1	51	236.5
<b>Donegal</b>	67.8	89.2	75.7	73	96	401.7

Table 5 Irish Residents Trip Expenditure by Visited County 2013-2017



## 4.2.3 ACCOMMODATION

Fáilte Ireland's publication on visitor accommodation capacity details the current stock and capacity<sup>6</sup> of accommodation in Ireland (Table 6). In terms of hotel provision in Co. Limerick, a total of 27 hotels are currently registered with Fáilte Ireland. The majority of these are three-star (over 45% of bed spaces) and four-star hotels (over 44% 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 129 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, Ardpatrik 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 7). 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 69 in 2018 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
<b>Hotels</b>	27	2,191	5,222
<b>Guesthouses</b>	1	26	58
<b>Bed and Breakfasts</b>	27	104	241
<b>Self-catering properties</b>	12	71	451
<b>Caravan and campsites</b>	1	28	112
<b>Hostels</b>	1	-	93
<b>Total</b>	69	2,420	6,177

Table 6 Accommodation Types in Limerick

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

Table 7 Hotel Provision in Other Counties

<sup>6</sup> Fáilte Ireland (2018) Accommodation Capacity 2018

## OCCUPANCY

Occupancy rates for Limerick city hotels have significantly improved in recent years on 2015 levels<sup>7</sup>. 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.



<sup>7</sup> Fáilte Ireland (2015) Accommodation Capacity by County 2015

### Importance of corporate visitors

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 8).

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

Table 8 Trending.ie Independent June 2017 report for Limerick - Market Segmentation

## 4.2.4 ATTRACTIONS

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 9)<sup>8</sup>. 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.

	2011	2012	2013	2014	2015	2016	2017
<b>The Hunt Museum (fee charging)</b>	-	-	-	-	108000	112,400	-
<b>King John's Castle (fee charging)</b>	38221	38752	47360	84819	107076	109,674	109,440
<b>Limerick City Gallery of Art (free)</b>	10000	59000	67000	77890	82525	-	85,000
<b>Ballyhoura Mountain Bike Trails</b>	60000	62000	60000	70000	70000	70,000	-
<b>Foynes Flying Boat Museum</b>	32133	32261	33549	36634	40578	49,198	52,000
<b>Desmond Banqueting Hall</b>	3702	4290	9205	11362	11150	10,006	13,501
<b>Limerick City Museum</b>	13498	9460	4000	9145	16075	-	-
<b>Griston Bog Ballylanders – Outdoor Classroom</b>	-	-	5000	5500	5000	5,000	-
<b>Pallaskenry Agricultural College</b>	790	800	800	920	-	-	5,000
<b>Boyce Gardens</b>	600	600	550	600	-	-	-
<b>Knockpatrick Gardens</b>	360	640	450	500	600	600	-
<b>Ryans Honey Farm</b>	150	-	135	130	-	-	-

Table 9 Visitor Numbers for Fáilte Ireland Registered Tourism Attractions 2011-2017

<sup>8</sup> 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 more recently published lists of visitor attractions are recorded Fáilte Ireland's Survey of Attractions for 2016 and 2017 (Source: Fáilte Ireland 2018)

## 4.2.5 TOURISM BUSINESSES

A wide range of businesses in Co. Limerick are engaged in activities that support or are supported by tourism. Based on the June 2017 Activity's Listings database published by Fáilte Ireland<sup>9</sup>, there are 109 tourism businesses in the county registered with Fáilte Ireland. The figures provided in Table 101 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 11, with the lowest share recorded for Limerick<sup>10</sup>.

Activity Category	Number
<b>Activity Operators and Tour Guides</b>	18
<b>Bike rental</b>	3
<b>Crafts</b>	3
<b>Equestrian Centres and Stud Farms</b>	4
<b>Restaurants</b>	30
<b>Pubs/Bars/Cafes</b>	26
<b>Golf and pitch and putt</b>	2
<b>Food shops or markets, markets, souvenirs</b>	9
<b>Parklands, Nature and Wildlife</b>	8
<b>Hotel Spas</b>	5
<b>Trace your Ancestors</b>	1
<b>Trace your Ancestors</b>	1

Table 10 Businesses involved in Tourism in Co. Limerick as registered in Fáilte Ireland activities list for 2017

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

Table 11 Tourism businesses along the west coast counties that feature on Fáilte Ireland's Activities Listing 2016



<sup>9</sup> Fáilte Ireland (2017) Activity Listing 20 June 2017. Available at: [www.failteireland.ie/FailteIreland/.../Failte-Ireland-Activity-Listings-20-June-2017.xls](http://www.failteireland.ie/FailteIreland/.../Failte-Ireland-Activity-Listings-20-June-2017.xls) Accessed 02/11/18.

<sup>10</sup> Fáilte Ireland (2016) Activities Listing 7 April 2016. Available at: <http://www.failteireland.ie/Research-Insights/Open-data.aspx> Accessed 27.04.17.

## 4.3 LIMERICK'S POTENTIAL

### 4.3.1 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. Limerick City and county have been designated a Wild Atlantic Way "Gateway" and "Region" respectively by Fáilte Ireland. In partnership with Limerick City & County Council, Fáilte Ireland will initiate a visitor experience development plan for Limerick in 2019 which will seek to extract Limerick's unique visitor offering while addressing gaps in that offering and provide recommendations to address them. However, Limerick 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.



### 4.3.2 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 Region 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 decision<sup>18</sup>. 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, water sports, cycling, hiking, walking and cycling (adventure and passive, 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.

<sup>18</sup> Ibid no. 12

### 4.3.3 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 8), 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 1.75 million people in 2017) 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 city and county have now been designated as WAW Gateway City and WAW Region respectively. Further to this, the various actions set out to enhance Limerick's offering in terms of waterways, activities, heritage, and arts and culture 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 for attracting international conferences, sporting

<sup>19</sup> 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

<sup>20</sup> 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

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 Cleaves 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 Development 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.

#### 4.3.4 Sports Innovation and Business Cluster

Sports tourism represents the fastest growing sector in global tourism.

According to the World Tourism Organisation (2013), sports tourism 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.

#### 4.3.5 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<sup>21</sup> 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. 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.

<sup>21</sup> 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.



#### 4.3.6 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 economy<sup>21</sup> shows that the sector currently generates a total overseas spend of €200m for the **Irish economy with more than 257,000 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 custom<sup>22</sup> 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.

<sup>21</sup> 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).

<sup>22</sup> 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](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



### 4.3.7 The visitor economy and place-making

As tourism is well defined both internationally<sup>23</sup> 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.

### 4.3.8 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:

<sup>23</sup> 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.



### 4.3.9 Targets

Based on Limerick's current performance in both international and domestic markets, general confidence held in the market<sup>24</sup>, and national targets to reach €5 billion in overseas revenue by 2025<sup>25</sup>, overseas and domestic visitor numbers to Limerick and associated revenue targets are set out below.

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 12 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 13 Target Overseas Visitor Numbers and Associated Target Revenue Growth

#### 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 12).

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 13).



<sup>24</sup> 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.

## 5.0 Case Studies

Case studies have been selected in terms of their relevance to the city and county of Limerick. These include destinations with a focus on

waterways, activities, heritage as well as arts and culture

### 5.1 Waterways

#### 5.1.1 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



## 5.1.2 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)

## 5.1.3 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



## 5.1.4 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 submari-um. 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.



## 5.1.5 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.



## 5.2 Activities

### 5.2.1 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.



## 5.3 Heritage

### 5.3.1 Úbeda, Andalucía, Spain

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



## 5.4 Arts and Culture

### 5.4.1 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 4,000m<sup>2</sup> 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 3,750m<sup>2</sup> 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 jobs<sup>25</sup>.

# 4

<sup>25</sup> 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](http://files.londonandpartners.com/l-and-p/assets/events/event_tourism_report.2016.pdf)



## 5.4.2 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 m<sup>2</sup> of modular space. The 24,000m<sup>2</sup> 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.



## 5.4.3 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.



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