

COUNTY CARLOW

Tourism Strategy and Action Plan 2020-2025

Prepared by:

 **Future Analytics**
Planning | Research | Economics

Prepared for:

 carlow
tourism

Supported by:

 **CARLOW**
COUNTY COUNCIL



County Carlow

Fuair an tionscnamh seo fóir-dheontas ó Coiste um Fhorbairt Pobail Aituil Cheatharlach, Clár Forbartha Tuaithe atá maoinithe ag Rialtas na hÉireann faoi Chlár Forbartha Tuaithe Éireann 2014-2020 agus ag Ciste Talamhaíochta na hEorpa d'Fhorbairt Tuaithe: infheistiú na hEorpa i Limistéir Tuaithe.

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Rialtas na hÉireann
Government of Ireland



Rialtas
na hÉireann
Government
of Ireland

Tionscadal Éireann
Project Ireland
2040



The European Agricultural Fund
for Rural Development:
Europe investing in rural areas

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EXECUTIVE SUMMARY

The County Carlow Tourism Strategy 2020-2025, commissioned by Carlow Tourism and Carlow County Council, has been carried out by Future Analytics Consulting and was guided by a sub-group of the Board of Carlow Tourism comprising Kathleen Holohan, CE Carlow County Council, Fr. Conn Ó Maoldhomhnaigh, President Carlow College, St. Patrick's and Michael Walsh, General Manager, Seven Oaks Hotel in conjunction with the CEO of Carlow Tourism, Eileen O'Rourke. This strategic roadmap has been prepared in the context of Ireland's Ancient East and is informed by the Sustainable Development Goals. The purpose of this strategy is to:

- improve the profile of Carlow as a holiday destination;
- maximise economic outputs for tourism in the county;
- grow tourism related employment in the county; and
- improve the product offering and visitor experience.

The objective is to build on good work done and develop an achievable road map for the future. Crucially, the strategy must ensure **development is balanced with protection for the heritage foundations upon which tourism is based.**

The strategy must also consider the context within which it is being prepared. Until recently the government remained positive with growth envisaged until 2025. In this context the Government revised upwards its projections for 2025, with headline targets for revenue from overseas tourists to increase by 25%; employment in the tourism sector to increase by 19%, and visitor numbers to Ireland to increase by 22%. However, in the context of **Covid-19 and Brexit**, it can be expected that there will be a significant decline in international visitors during 2020 and 2021, with a slow increase thereafter, which will impact upon revenue and employment targets.

County Carlow is a gem with considerable untapped tourism potential. Overlooked by many domestic and overseas visitors, the county has beautiful mountains and rivers, tranquil countryside, world-class gardens and houses, and a wide array of outdoor activities less than an hour from Dublin. However, the county lacks a flagship attraction and many existing attractions are not visitor ready. Carlow Tourism is well-respected with strong marketing material, but the current brand lacks market resonance and the county is not viewed by tour operators as a desirable destination.

This strategy recommends a **marketing proposition** for County Carlow as:

'A home of Irish heritage and culture - where visitors can discover the stories of Carlow people in spectacular houses and gardens, set amidst scenic mountains and picturesque rivers which provide the backdrop for a diverse range of outdoor activities and other historic and nature-based offerings. Experience Ireland's Ancient East on Dublin's Doorstep'

Underpinning the objectives and actions for the county a **vision for County Carlow as a visitor destination** is proposed:

'Through implementation of this strategy County Carlow will be a welcoming and high-quality destination offering visitors a diverse range of experiences based on the county's heritage – an opportunity for visitors to discover historic big houses, spectacular gardens and unique ecclesiastical and historic/cultural attractions, and to easily engage in outdoor recreation, set amidst the county's unspoilt environment, with choices to stay overnight in vibrant towns and villages.'

This will be achieved by raising visitor awareness of Carlow, through development of a flagship attraction and enhancing other key attractions, aligned with Ireland's Ancient East, and effective partnerships between public, private and community sectors, and with a focus on low-impact responsible tourism.

The vision for County Carlow is to achieve a **step change in the awareness of the county amongst domestic and overseas visitors** and to ensure opportunities identified to enhance the offer are taken through **effective public-private-community partnerships**, while **harnessing opportunities presented by the Ireland's Ancient East brand**. This vision underpins the objectives and actions for the county and is pragmatic, the goal is to **increase visitor revenue and enhance job creation** in County Carlow, supporting a sustainable tourism economy based on built and cultural heritage and the natural environment, while **ensuring the resources upon which tourism is based are protected**.

To achieve this vision, **five pillars and associated goals** are defined in Chapter Four, supported by a range of recommendations and actions.

These are illustrated in Figure 1.



Vision

“Through implementation of this strategy County Carlow will be a welcoming and high-quality destination offering visitors a diverse range of experiences based on the county’s heritage – an opportunity for visitors to discover historic big houses, spectacular gardens and unique ecclesiastical attractions, and to easily engage in outdoor recreation, set amidst the county’s unspoilt environment, with choices to stay overnight in vibrant towns and villages.’

This will be achieved by raising visitor awareness of Carlow, through development of a flagship attraction aligned with Ireland’s Ancient East, and effective partnerships between public, private and community sectors, with a focus on low-impact responsible tourism.

Pillars

Pillar 1:

Destination Management

Pillar 2:

Visitor experience and product development including festivals and events

Pillar 3:

Capacity Development

Pillar 4:

Partnership Development

Pillar 5:

Brand and Marketing Communications

Figure 1:
Strategy Overview



Goals

Goal 1: To reinforce destination management structures to ensure a coordinated approach to tourism development, that supports the growth of the County Carlow tourism economy.

Goal 2: To identify opportunities for product enhancement and visitor experience development that align with the vision and themes of the Ireland's Ancient East brand and with visitor target market segments.

Goal 3: To strengthen the capacity of industry to create and promote experiences that will attract priority segments from key markets.

Goal 4: To identify internal and external collaborative opportunities between public, private and community sectors that maximise return on investment and that facilitate the development of enterprises and experiences around a shared vision and ambition.

Goal 5: To raise the profile of County Carlow as a high-quality visitor destination that leverages the Ireland's Ancient East brand and attracts more visitors matched to County Carlow's tourism offer.

Actions

- **Blackstairs Task Group**
- **Signage Audit and wayfinding**
- **Public transport network (Ring-a-Link)**
- **Access for all**

- **New science/industrial heritage museum**
- **Visitor Experience Plan for VISUAL**
- **Enhanced attractions, hubs, routes, trails**
- **A Journey Through Time**
- **Big Houses and Beautiful Gardens**
- **Valleys Views and Vales**
- **Inspired by Carlow**

- **Capacity building**
- **Market ready saleable experiences**
- **Bundled day and overnight itineraries**
- **Training supports**
- **Reduce tourism carbon footprint**
- **Local sourcing**

- **Intercounty initiatives and itineraries**
- **Tourism Ambassadors**
- **Strategic discussions**

- **Community surveys**
- **County Carlow Food and Drink Trail**
- **Relaunch County Carlow brand**
- **Budget Planning and Activity Plans**
- **International and domestic promotion**
- **Capitalising on Ireland's Ancient East**
- **Collaborative marketing**
- **Digital marketing**



This strategy is informed by the 2030 Agenda for Sustainable Development landscape. Carlow County Council was chosen as one of twelve leaders in the state to drive forward **Sustainable Development Goals (SDGs)**; responsible for raising awareness and overseeing the national implementation of the 2030 agenda by highlighting practical ways in which communities and organisations can contribute. The overall vision, recommendations and actions outlined hereafter have therefore been developed with their potential to contribute to the SDGs in mind. By extension, the aim is that this approach will benefit the economy, community and environment of County Carlow.

The priority of the recommendations is to ensure effective **destination management (Pillar 1)** and recommendations and actions focus on:

- measures to increase the revenue base for Carlow Tourism;
- a new Carlow Rural Recreation Officer role;
- a new Blackstairs Mountains Task Group;
- a signage strategy;
- increasing community involvement in tourism decision making;
- exploration of a bus service to link attractions and accommodation hubs;
- encouraging and facilitating more accessible tourism; and
- overview and monitoring.

Visitor experience and product development

(Pillar 2) is considered fundamentally important to expand the tourism offer of the county. This element of the strategy is informed by consultation undertaken as part of the strategy development; by consideration of Ireland's Ancient East themes; and matching visitor experience investment to visitor target market needs.

The most significant proposal under this objective is for a feasibility study in Carlow Town **which links the industrial and scientific historic sites, ancestors, characters and experiences throughout County Carlow**. This flagship attraction could function as a visitor hub and attractor for the county, driving growth in overseas and domestic tourism and raising awareness of the wider County Carlow offer. While other attractions offer significant potential, such as Duckett's Grove, Altamont Gardens and St. Mullins, the proposed flagship concept offers the greatest potential over the lifetime of this strategy to grow year-round visitor numbers and raise the profile of the county.

Informed by extensive community and trade engagement and detailed destination analysis, **four themes are identified for visitor experience, product development and marketing purposes** that play to the county's strengths and offer the best opportunity to raise awareness of the county's tourism offer, enhance visitor experience and benefit those living and working in the county. These themes, 'A Journey Through Time', 'Big Houses and Beautiful Gardens', 'Valleys Views and Vales' and 'Inspired by Carlow', provide a framework for development, as shown in figure 2. Importantly they target visitors most likely to be interested in an extended visit to the Ireland's Ancient East destination, the 'Culturally Curious' and 'Great Escapers'; as well as experiences identified as of interest to the domestic market e.g. big houses, gardens and walking.

MEGALITHIC,
ECCLESIASTICAL AND
NORMANS (BUILT
HERITAGE)



HOUSES & GARDENS



ACTIVITIES AND
PLACES (NATURAL
HERITAGE)



CULTURAL HERITAGE



A Journey Through Time

Early Settlers:

Brownshill Dolmen, Rathgall Hillfort, Ballon Hill, Carlow County Museum

Ecclesiastical Era:

St. Mullins, Columban Way, Clonmore Castle and Monastic Site (long-term), County Carlow Spiritual Highlights Tour, St. Laserians Cathedral, Adelaide Memorial Church, Carlow College St. Patricks, Carlow Cathedral

Norman Strongholds:

St. Mullins, Carlow Castle with river linkages, Carlow Castles Trail



Big Houses & Beautiful Gardens

Ireland's Big House Capital:

Altamont House and Gardens, Duckett's Grove, Huntington Castle, Borris House, Lisnavagh House, Carlow Big Houses Festival

Blooming Gardens:

Altamont Gardens and Walled Garden, Carlow Garden Festival, Duckett's Grove Walled Gardens, Arboretum Home and Garden Heaven, Leighlinbridge, Carlow Garden Trail



Valleys Views and Vales

Do it the Barrow Way:

The Barrow Corridor Recreational, Tourism and Commercial Product Identification Study (with actions updated and refined), watersports hubs, loop walks, Carlow Town Hub for the Barrow Way

Reach for the Sky:

Carlow Outdoor Recreation Strategy, Adventure Centre (mobile), walking hubs at Borris and Myshall, Columban Way, link Kildavin/Clonegal

Slaney Excursions:

Carlow Outdoor Recreation Strategy, Rathvilly River Trail, angling, kayaking

Room to Breathe:

Countryside towns and villages and walks, scenic drives, loop walks, cycling routes, urban realm, Blueway sites, Borris Viaduct



Inspired by Carlow

Rejoice and Revel:

Carlow Arts Festival, new Carlow Outdoor Adventure Festival, Big Houses Festival, International Achievers Summer School, Borris House Festival of Writing and Ideas, Pan Celtic Festival, Riverfest/Barrow Regatta, Emigrants Trail

Carlow Cultural Quarter:

Carlow Art Science attraction feasibility study, VISUAL, Carlow County Museum, Carlow College, St. Patrick's, Carlow Library, Carlow Cathedral, Carlow Tourist Office, urban realm



Figure 2:
Visitor Experience
and Product
Development Themes
and Sub-themes



Strengthening the capacity of the County Carlow tourism industry is the focus of **Pillar 3**. This includes recommendations to:

- develop alternative livelihoods for Carlow residents;
- support the capacity of owners of key attractions;
- support tourism providers to develop saleable itineraries including day tour and multi-day tour packages that are aligned with Ireland's Ancient East;
- support local sourcing to increase local revenue retention and build local pride;
- identify training needs; and
- encourage tourism related enterprises to reduce their impact on the environment.

Recommendations regarding **partnership development** are discussed in **Pillar 4**. These include:

- collaborative development and promotion of tourism at a regional level to enable economies of scale and a strategic approach;
- inter-county itineraries and trail development;
- encouraging greater buy-in from the local community through a Carlow Tourism Ambassador programme;
- strategic discussions between Carlow County Council, Carlow Tourism and key agencies such as OPW, Waterways Ireland, Coillte and Ireland's Uplands Council.

Brand and Marketing Communication recommendations (Pillar 5) seek to raise the profile of County Carlow as a visitor destination in a way that leverages the marketing and investment in the Ireland's Ancient East brand and targets visitors for whom the Carlow offer would appeal. **The primary opportunity for County Carlow to drive growth in the target overseas visitor market is in continuing and developing collaboration with Fáilte Ireland as part of Ireland's Ancient East.** It is a recommendation that Carlow Tourism prioritise collaborative marketing initiatives under the Ireland's Ancient East brand, including participation in the 'Tales of Two

Worlds' Visitor Experience Development Plan, ongoing training opportunities and other initiatives developed under the brand. Recommendations include those related to:

- measures to evaluate resident and visitor satisfaction;
- a brand relaunch in the domestic market with a new strapline;
- a new County Carlow Food and Drink Trail based on a County Carlow Food Network;
- measures to raise awareness of the County Carlow offer, including:
 - » driving awareness of the Carlow offer through use of social media and digital influencers;
 - » targeting corporate companies in Dublin with younger demographic employees for weekend activities and entertainment;
 - » encouraging greater Carlow local community awareness of the Carlow tourism offer through open days and promotion e.g. 'Spend a day in Carlow', 'Come and Try It', encouraging use of local walks;
 - » encouraging greater tourism trade awareness of the Carlow tourism offer through familiarisation events;
 - » targeting overseas students and their families at IT Carlow, developing packages that would appeal and encourage out of season engagement;
 - » attending national and international trade and consumer fairs with a focus on increasing international visitors to County Carlow including World Travel Market in London, ITB in Berlin and Meitheal, CMT Stuttgart, Holiday World Dublin and Bloom subject to the availability of funding;
 - » defining and promoting saleable itineraries which include an experiential aspect, matching motivators of market segments, working with Fáilte Ireland and aligning with Ireland's Ancient East.
- communication and collaboration measures, including:
 - » collaborative marketing initiatives under the Ireland's Ancient East brand;



» spreading visitors throughout the South East and Ireland Ancient East regions.

- digital marketing strategy.

As part of the strategy **thirteen** catalytic actions have been highlighted that have potential to achieve positive change including:

- *establish a Blackstairs Mountain Task Group* (action 01.04) and support actions in the *Carlow Outdoor Recreation Strategy*;
- Implement a coherent and consistent *signage and wayfinding strategy* (action 01.05);
- *Develop a feasibility study for a new flagship attraction in Carlow* Town which links the industrial and scientific historic sites, ancestors and experiences throughout County Carlow. (action 02.01);
- *Commission a new feasibility study into, and seek funding for, the collaborative upgrade of the St. Mullins monastery site and Norman Motte* as an integrated visitor experience in partnership with OPW and the local community (action 02.04);
- *Develop a County Carlow Spiritual Highlights Tour* (action 02.05), a *Carlow Castles Trail* linking key sites in the county (action 02.08) and a *Carlow Emigrant Trail* (02.25);
- *Work with OPW to develop Altamont House and Gardens as a significant visitor experience* for County Carlow (action 02.09);
- *Identify the key strategic projects required to enhance the attractiveness of Duckett's Grove* as a visitor attraction and seek funding to implement these projects (action 02.10);
- *Work with Waterways Ireland to implement, update and revisit actions outlined in The Barrow Corridor Recreational, Tourism and Commercial Product Identification Study* (action 02.12);

- *Deliver a Fáilte Ireland Destination Towns Agenda for County Carlow* including the implementation of the *Carlow Town Regeneration Vision and Implementation Strategy* (RVIS) (action 02.26);
- *Support tourism providers and domestic and overseas tour operators to develop day tour or multi-day tour packages* (action 03.03);
- *Discuss, identify, and prioritise collaborative opportunities for clustered and joint experience development and promotion of tourism to include inter-county itineraries* e.g. Ireland's Ancient East International Gateway Garden Festival (action 04.02);
- *Raise awareness and promote* – use of influencers, targeting large corporate companies, encouraging greater Carlow community and trade awareness of the Carlow tourism offer, targeting overseas students in IT Carlow and Carlow College, St. Patrick's, attending international trade and consumer fairs, promoting defined itineraries to target market associations (action 05.05);
- *Communicate and collaborate* – collaborative marketing initiatives under Ireland's Ancient East brand, engaging with Fáilte Ireland in development and implementation of VEDPs, hosting media visits and fam trips (action 05.06).

The strategy includes a comprehensive action plan with actions grouped under the five pillars and associated goals. Specific actions are highlighted for each pillar, identifying lead agency and partners, timeline for completing the action and key performance indicators.

To ensure the strategy meets desired objectives, and contributes towards Sustainable Development Goals, relevant measures regarding effective progress, monitoring and evaluation are included in Chapter Five.

Input was requested from all partner agencies identified in respect of actions and the final strategy was signed off by the Board of Carlow Tourism.



South Carlow Village of Borris with it's 16 Arch Viaduct, and Borris House in the background

INTRODUCTION

1.1

Building on Strong Foundations

Carlow is one of Ireland's gems, a peaceful place with a wide range of things to see and do, set amongst beautiful rural landscapes including mountains, rivers and a tapestry of fields and villages. **The rich history of the county aligns well with the Ireland's Ancient East brand**, with an array of built and cultural heritage from many different eras of Ireland's history. Quiet country villages and attractive waterways, including the Barrow, Burrin and Slaney rivers, offer domestic and overseas visitors an opportunity to connect with the people and heritage of Ireland.



Carlow County Museum

While the world-class gardens and unique estates of the county provide a significant, and relatively untapped, potential for development, there are other less tangible assets that make Carlow an appealing and great place to visit. These include the authenticity and friendliness of the people, tranquillity of the countryside and strong sense of place in the villages of the county. The county also benefits from a strategic location with excellent road and public transport links an hour from Dublin and close to the visitor hub of Kilkenny. Carlow offers visitors an authentic slice of vibrant rural Ireland, in tandem with the opportunity to visit other nearby destinations. **The natural, built and cultural heritage of the county are the foundations upon which tourism is based, assets those living and working in the county inherit from the past and protect for future generations.**

Carlow Tourism and Carlow County Council, in tandem with the people and tourism industry of the county, have achieved a substantial amount in recent years to develop and promote the county and this must be acknowledged. **The objective of this tourism strategy is to build on good work done and develop an achievable road map for the future.** Crucially, the strategy must ensure that development is balanced with protection for the resource upon which tourism is based, including the heritage of the county and less tangible positives such as the unhurried ambience of the towns and villages.





Huntington Castle
Main Dining Room

1.2

Purpose of this Study

The tourism sector is important to Carlow, but the county has consistently underperformed in comparison to most neighbouring counties and ranked 19th out of the 26 counties for overseas tourism revenue generation in 2017, the last year for which comparable data is available. The **purpose of the County Carlow Tourism Strategy 2020-2025** is to:

- improve the profile of Carlow as a holiday destination;
- maximise economic outputs for tourism in the county;
- grow tourism related employment in the county; and
- improve the product offering and visitor experience.

The County Carlow Tourism Strategy 2020-2025 provides clear direction and an enabling framework for a **cohesive and integrated approach to tourism development and growth in County Carlow**. The strategy takes stock of the current situation within County Carlow, and of external influences, across a wide range of criteria. A thorough baseline analysis has enabled key advantages and characteristics of the county to be identified and examined, where product and experience gaps exist. **This strategy is designed to ensure County Carlow can maximise benefits arising from the success of the Ireland's Ancient East brand and deliver widespread benefits to the local economy and communities.**

“This strategy is designed to ensure County Carlow can maximise benefits arising from the success of the Ireland’s Ancient East brand and deliver widespread benefits to the local economy and communities.”



Carlow College, St. Patrick's

1.3

Strategic Approach

Comprehensive analysis of the county's tourism offer was undertaken to inform this strategy, based upon a desk-top review of all available tourism information, including Fáilte Ireland, Carlow County Council, Carlow Tourism, tourism attraction data, other published reports and data and conversations with tourism product providers, as well as **targeted visits** throughout the county. This was supplemented by **'strategic conversations'** held with a number of key stakeholders in the county, from June 2019 to August 2019, 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 provided in Appendix 1. **Online consultation** was also carried out using the national Public Participation Network (PPN) database. Consultation with tourism trade and the local community was carried out through a mix of workshops (3), strategic conversations and an online survey.

Three public workshops were held across the county in Carlow Town, Borris and Tullow. The workshops brought together voices 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, and participants who attended, is detailed in a *Workshop Outcomes Report* provided to Carlow Tourism and Carlow County Council which can be found at the following link: www.carlowtourism.com/workshopoutcomes. County Carlow 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.**

These sources of information and insight were drawn together in a separate *Situation Analysis Report*, which includes detailed research to underpin this strategy, ensuring the vision and roadmap for tourism development is evidence based, with pragmatic actions based on a thematic approach.



Walking in the Blackstairs Mountains

1.4

Report Structure

The format of this report, the County Carlow Tourism Strategy 2020-2025, is as follows:

Chapter 2

describes the current situation, including a summary of the strategic context, the performance of Carlow as a tourism destination and market analysis for County Carlow, setting it against the strategic objectives of 'Ireland's Ancient East'. This chapter also provides detail on target markets and current promotional activities and responsibilities, includes an online link to a detailed destination audit outlining the foundations for tourism in County Carlow, and provides an overview of consultation outcomes.

Chapter 3

establishes strengths, weaknesses, opportunities and threats that relate to tourism in County Carlow and identifies tourism development priorities that inform the pillars of the strategy.

Chapter 4

includes a vision for the development of tourism in the county, five pillars and associated goals to realise the vision, and outlines the roadmap for change, including recommendations under each goal and an action plan.

Chapter 5

concludes with a summary of monitoring and evaluation measures to ensure the strategy achieves stated goals.



Adelaide Memorial Church



**Strategic
Context**



**Destination
Audit**



**Destination
Performance**



**SWOT &
Strategic
Principles**



Consultation



**Market
Assessment**



**Vision &
Recommendations**



Actions



**Monitoring &
Evaluation**





*Nine Stones Viewing
Point on the Blackstairs
Mountains*



Tyndall's Blues by Mark Joyce. VISUAL Carlow 2020 (Ros Kavanagh)

CURRENT SITUATION

2.1

Context

The vibrant county of **Carlow has much to offer visitors as a tourism destination** ranging from mountains, rivers and tranquil countryside to historic buildings from several eras, and a strong cultural heritage. Indeed, such is the breadth of the offer in the county that it is perhaps surprising more visitors have not yet discovered it. This in turn contributes to the charm of the county as a visitor destination – one not overrun with coaches and cars or queues at many attractions, perhaps ever more important in the context of the Covid-19 health crisis.



Haroldstown Dolmen

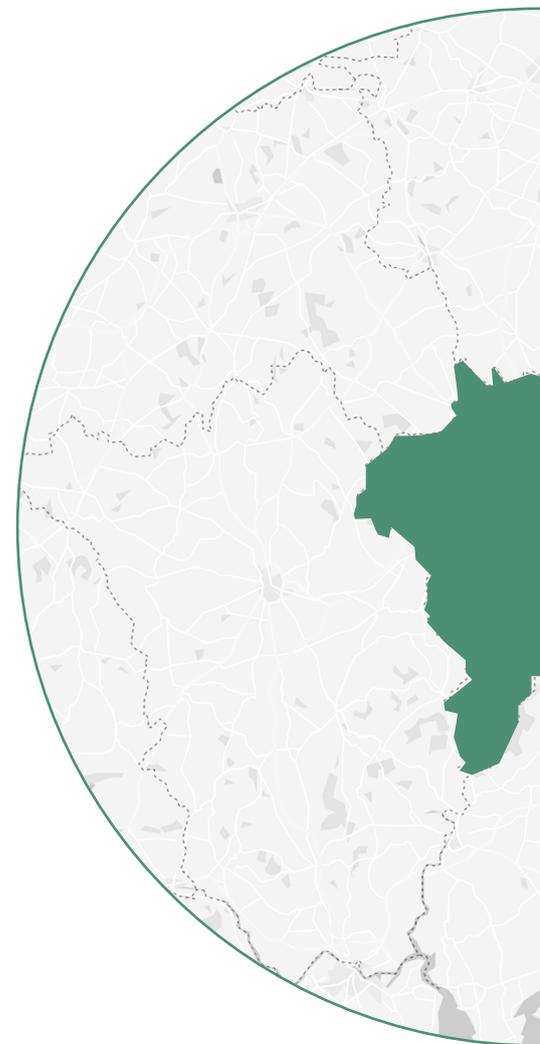
Carlow occupies a strategic geographic position on the east coast of Ireland, bordered by Kildare, Wicklow, Wexford, Kilkenny and Laois. The M9 motorway provides challenge and opportunity, with many visitors bypassing the county for other destinations, such as Kilkenny, yet enabling easy access to the county and the south-east for visitors from Dublin, 90km to the north. The River Slaney runs through the eastern part of the county while the majestic River Barrow runs through the west, with tranquil and fertile farmland between. The River Burrin offers a range of recreational opportunities in an urban setting with the River Burrin Linear Park used by residents and visitors in Carlow Town. The Blackstairs Mountains provide a dramatic backdrop to the southern part of the county, providing **many opportunities for outdoor recreation including walking and cycling**. The River Barrow offers a corridor of recreation activity along the western border of the county, with opportunities to experience the river by boat, kayak or walking and cycling along the towpath. The Carlow Garden Trail and Festival showcases the **spectacular range of gardens** in this floral county, including those at Altamont, Leighlinbridge, Huntington Castle, Duckett's Grove and the tranquil Delta Sensory Gardens.

County Carlow is an historic county, with its foundation dating back to the late 12th and early 13th Centuries with the arrival of the Normans, although with over 6,000 years of earlier settlement evidence, including the **Brownshill Dolmen** and fascinating ecclesiastical settlements of national importance, such as the 7th Century **St. Mullins** monastic site and medieval **St. Laserian's Cathedral** at Old Leighlin, the oldest working building in the county. **Carlow County Museum** provides visitors with an intriguing insight into the county's historic and cultural past. Carlow town is of historic importance where the imposing 13th century **Carlow Castle** remains can be viewed.

The beautiful countryside of Carlow was a desirable location for many settlers, with the town of Carlow a stronghold for Gaelic clans, Vikings and Normans who have left a **wealth of castles and big houses** in the county, which are of great interest to overseas and domestic visitors and can help bring the Ireland's Ancient East story to life. The traditional rural character of Carlow is enhanced by many attractive towns and villages providing visitors with a sense of a **slower unhurried pace that has been lost in many other places in Ireland.**

Carlow Town is a culturally transforming place - there is a rich cultural ecosystem which creates conditions that allow for authentic and true experiences for visiting tourists and locals to enjoy and participate in. **Culture is also alive and kicking in County Carlow** with a wide range of festivals including the increasingly popular Éigse/Carlow Arts Festival, Borris House Festival of Writing and Ideas and the Carlow Garden Festival. Within the wider County Carlow area, a range of indigenous food, drink and craft are available, inspired by the unique landscape and people of the county. Farmers' markets offer visitors the opportunity to engage with local

people, enhancing their experience of Carlow. The busy college town of Carlow offers visitors evening entertainment including live traditional music, although currently only on two nights each week, and opportunities for shopping and walking tours, although these are only available for group tours or during dedicated festivals and events e.g. Heritage Week. The developing cultural quarter includes the VISUAL Centre for Contemporary Art and George Bernard Shaw Theatre for contemporary and traditional productions. While many cultural venues such as VISUAL, Carlow County Museum and Tullow Museum, as well as the many big houses (only Borris House, Huntington Castle and Duckett's Grove are open to the public on a



regular or semi-regular basis) provide a portal to the county's cultural heritage, there is perhaps a lack of articulation within and consequent lack of awareness outside of the county of some key characters, such as scientist and environmentalist John Tyndall.

The natural, built and cultural heritage of Carlow are the foundations that attract visitors to the county. The opportunity lies in ensuring this heritage is protected for current and future generations and that visitors can access key places, stay overnight and purchase immersive experiences based on these assets, making them wish to return to County Carlow and recommend visits to others.

This chapter begins with a summary of **destination performance** (section 2.2) including an overview of key tourism data, visitor origin and profile, tourism projections, and consideration of the impacts of Covid-19. **Market analysis** is discussed in section 2.3 including visitor target markets, experience development, brand analysis, digital marketing and cooperative marketing.

This chapter concludes with a summary of key stakeholder views.

Carlow Tourism Foundations

A detailed destination audit was completed as part of the strategy which provided valuable information on the tourism assets of the county. This audit can be accessed via the following link www.carlowtourism.com/destinationaudit. Four maps highlighting the key natural, built and cultural heritage assets in addition to transport and access options are included here for quick reference purposes.

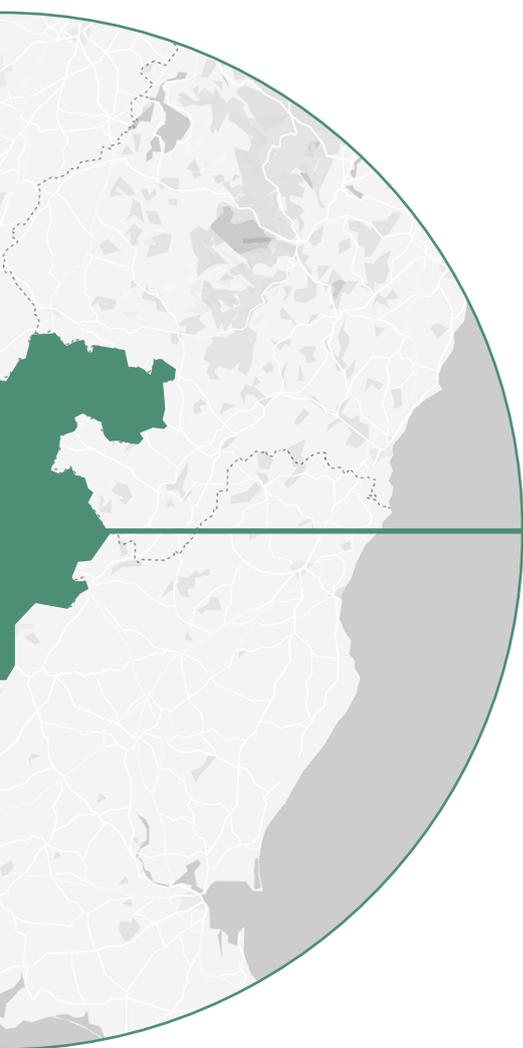


Figure 2-1 Carlow Context



County Carlow Natural Heritage Map

AREAS

-  1 Blackstairs Mountains
-  2 The Barrow River Corridor
-  2a Burrin River
-  3 The Slaney River Corridor

CARLOW GARDEN TRAIL

-  4 Altamont Gardens and Altamont Plant Sales
- 5 The Meadows Garden, Myshall
- 6 Leighlinbridge - The Garden Village
- 7 Arboretum Inspirational Gardens and Arboretum Home and Garden Heaven
- 8 Borris House and Gardens
- 9 Delta Sensory Gardens
- 10 An Gairdín Beo, Carlow
- 11 Duckett's Grove Walled Gardens
- 12 Hardymount Gardens
- 13 Kilgraney House and Herb Gardens
- 14 Huntington Castle and Gardens
- 15 Barrow Experience Garden – BEAM Services
- 16 Ballon Tree Trail
- 17 Myshall Tree Trail

TRAILS

-  18 South Leinster Way
-  19 The Barrow Way
-  20 Clashganny Forest Looped Walks
- 21 Clogrennan Wood Looped Walk
-  22 The Wicklow Way
-  23 Kilbrannish Forest Recreation Areas (North and South)
- 24 Oak Park Forest Park Looped Walks
- 24a Bahana Forest Looped Walks

OUTDOOR/INDOOR ACTIVITIES

-  25 Blackstairs Ecotrails
-  26 River Barrow Angling
-  27 Murph's Fishing Tackle
-  28 Go With the Flow River Adventures
- 29 Paddle Your Own Canoe
-  30 Pure Adventure, Graiguenamanagh
-  31 Waterside Bike and Hike, Graiguenamanagh
-  32 Wildways Adventures, Carlow Town
-  33 BoatTrips.ie, Carlow Town Park
-  34 Hang-gliding and Paragliding
-  35 Carlow Town Walk
-  36 Mount Wolseley Golf Resort
- 37 Carlow Golf Club
- 38 Borris Golf Club
- 39 Bunclody Golf and Fishing Club
- 40 Quinagh House Par 3
-  41 Bagenalstown Outdoor Heated Swimming Pool
- 42 Barrowline Cruisers/ Jennifers Travels (Located in County Laois and Kildare - operating partly on the River Barrow)
- 43 Carrigbeg Riding Stables
-  44 TRI795 Carlow Sprint Triathlon
- 45 Barrow Valley Activities Hub, Graiguenamanagh
- 46 McGrath Park Bagenalstown
- 47 Southern County Fishing Resort
- 48 Bagenalstown River Boat (upcoming)
- 49 Graiguecullen Swimming Pool

County Carlow Built Heritage Map

PRE-CHRISTIAN ARCHAEOLOGY/ CELTIC HERITAGE



- 1 Brownhill Dolmen
- 2 Cloch -a-Phoill, Ardristan
- 3 Haroldstown Dolmen
- 4 Rathgall, Shillelagh Road
- 5 Clonmore Monastic Site
- 5a Ballon Hill

INDUSTRIAL HERITAGE



27 Barrow River Industrial Heritage



28 Minch Norton & Co. Malt House, Muine Bheag



29 Borris Viaduct

30 Milford Mills

ECCLESIASTICAL



- 6 Carlow College/St. Patrick's, Carlow Town
- 7 St. Patrick's Church, Rathvilly
- 8 St. Laserian's Cathedral and Holy Well, Old Leighlin



9 The Adelaide Memorial Church (miniature Salisbury Cathedral)

10 St. Columbanus and St. Finian connection, Myshall

11 Cathedral of the Assumption, Carlow Town

12 Quaker Graveyard, Ballon



13 Cranavane Holy Well, Kildavin



14 Tobar Bhride Holy Well, Myshall

15 St. Willibrord connection, Rath Melsigi, Clonmelsh

16 Lorum Church

17 Carlow Trails of the Saints – various locations

18 St. Mullins Monastic Ruins and Heritage Centre

35 Bishop Daniel Delany Museum, Tullow (also in museum section)

MUSEUMS AND GALLERIES



31 VISUAL, Carlow Town

32 The Lace Gallery, Kilbride



33 Carlow County Museum

34 Carlow Military Museum

35 Bishop Daniel Delany Museum, Tullow (ecclesiastical)



36 Tullow Museum

37 The Weavers Cottages, Clonegal

38 St. Mullins Heritage Centre (ecclesiastical)

BIG HOUSES & CASTLES



19 Ballyloughan Castle, Muine Bheag

20 Ballymoon Castle, Muine Bheag

21 Black Castle, Leighlinbridge

22 Carlow Castle



23 Clonmore Castle, Clonmore

24 Huntington Castle and Gardens, Clonegal

25 Borris House and Gardens, Borris

26 Duckett's Grove Historic House and Walled Gardens

County Carlow Cultural Heritage Map

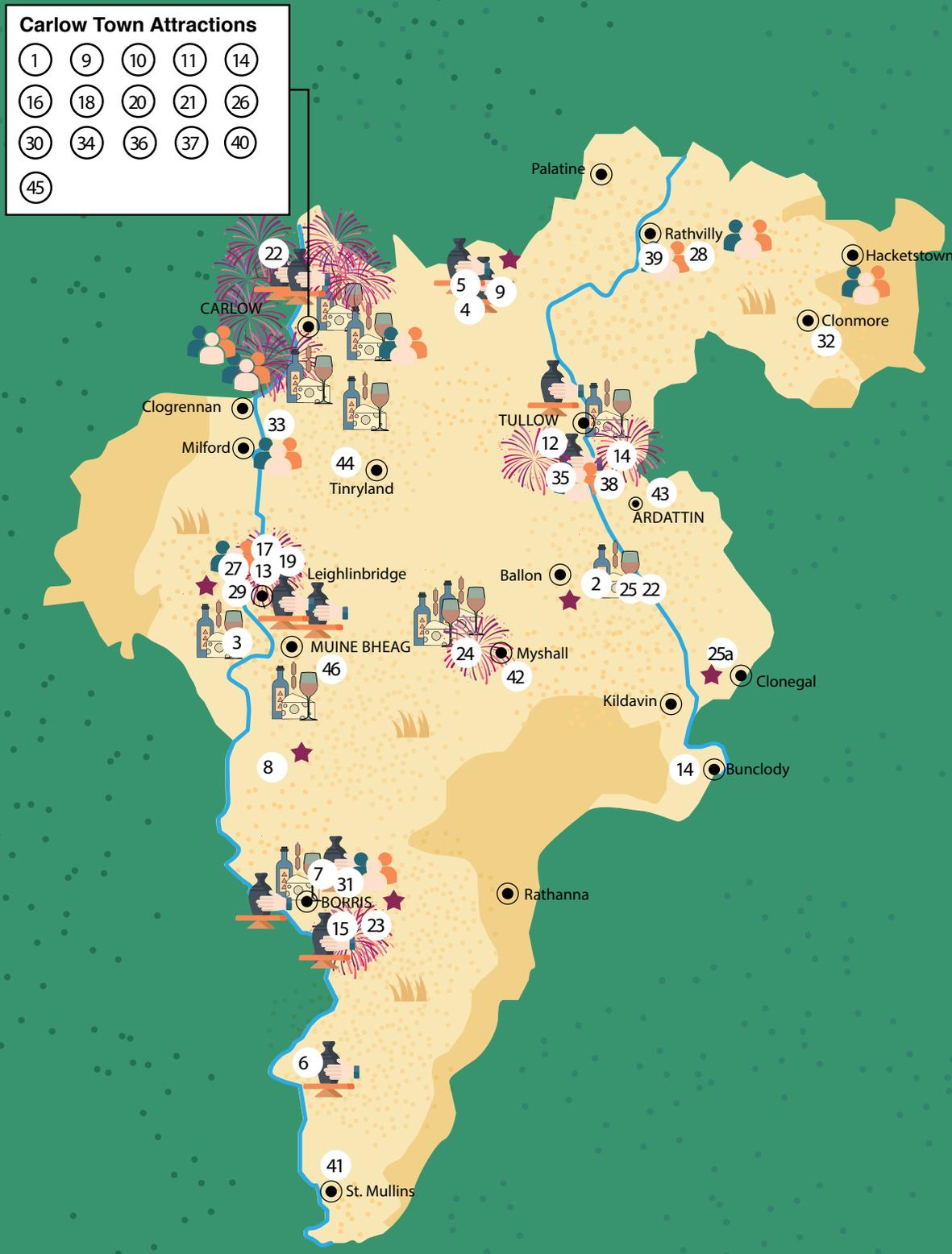


Figure 2-4 Cultural Heritage

County Carlow Cultural Heritage Map

ARTISAN FOOD, DRINK AND MARKETS



- 1 Carlow Farmers Market, Carlow (Every Saturday)
- 2 Malone's Fruit Farm and Farm Shop, Ballon
- 3 Royal Oak Distillery, Royal Oak

ARTISAN CRAFT



- 4 Ballyshane Studio, Duckett's Grove
- 5 NicAngels Candles & Michael Deane Stained Glass Artist, Duckett's Grove
- 6 Mount Brandon Pottery School, Tinnahinch
- 7 The Store House at Borris House
- 8 Martin Marley Ceramics, Kilgraney House and Herbs Gardens

FESTIVALS AND EVENTS



- 9 Carlow Vintage And Classic Motor Club Car Display (*Duckett's Grove - May and Carlow Town - August*), Carlow
- 10 Follow me Up to Carlow Set Dancing Weekend (*October*), Carlow
- 11 Seachtain na Gaeilge (March) Féile an Fomhair Autumn Bi-lingual Festival (*October*), Carlow Town
- 12 Tullow Agricultural Show (*August*), Tullow
- 13 Bulb Planting Festival (September), Arboretum Home and Garden Heaven
- 14 County Carlow Golf Classic (September)
- 15 Carlow Autumn Walking Festival (*October*), Borris
- 16 Carlow International Karate Competition (*October*), Carlow
- 17 Spookey the Square Pumpkin (October), Arboretum Home and Garden Heaven
- 18 Halloween Festival
- 19 Cut Loose Pruning Masterclass (November), Arboretum Home and Garden Heaven
- 20 Delta Centre Christmas Fair and Lights Display (*December*), Carlow
- 21 Carlow Arts Festival (June), Carlow
- 22 Altamont Plant Sales - Gardening Courses and Workshops
- 23 Borris House Festival of Writing and Ideas (*June*), Borris
- 24 National Ploughing Championships (*September 2020*), Fenagh (not an annual event)
- 25 Snowdrop Month (February) at Altamont Gardens and Plant Sales
- 25a Halloween at the Castle, Huntington Castle, Clonagal
- ★ Carlow Garden Festival (*July-August*), Various locations

PEOPLE AND ASSOCIATIONS



- 26 William de Marshal, Founder of Carlow Castle, Carlow
- 27 John Tyndall, Scientist and Mountaineer, Leighlinbridge
- 28 Kevin Barry, Irish Revolutionary, Rathvilly
- 29 Myles Keogh, American Civil War Commander, Leighlinbridge
- 30 Kathryn Thomas, RTÉ television presenter, Carlow
- 31 Arthur McMorrough-Kavanagh, MP for Co. Carlow 1868-1880, Borris
- 32 PJ McCall, Songwriter and Poet, Clonmore
- 33 Walt Disney, Animator and Creator, Clonmelsh, Tinryland
- 34 Val Voudsen, Actor, Poet and Playwright
- 35 Bishop Daniel Delany, Founder of Brigidine Sisters and Patrician Brothers, Tullow
- 36 Frank O'Meara, Impressionist Painter, Carlow
- 37 George Bernard Shaw, Carlow
- 38 Captain Patrick Reid, WWII Prisoner-of-War Escapee, Tullow
- 39 Turtle Bunbury, Author, Rathvilly
- 40 William Desmond Taylor, Film Maker, Carlow
- 41 Michael Flatley, Dancer, Choreographer, (Lord of the Dance, Feet of Flames) and Musician, St. Mullins
- 42 Peter Fenelon Collier, Publisher
- 43 Pierce Butler, Co-Signatory of the American Constitution
- 44 Paddy Dowling, Pioneer of Rural Electrification, Carlow Person of the Century 2000
- 45 Tom Ryan, Director General GAA
- 46 Eamonn Tracey, World Ploughing Championship Winner

County Carlow Access and Transport Map



Figure 2-5 Access and Transport

County Carlow Access and Transport Map

ROADS

-  1 Motorway M9
 -  2 National Primary Road N80
 -  3 National Primary Road N81
 -  4 Local Roads
-

RAILWAY

-  5 Railway line
 -  6 Railway Station at Carlow Town and Bagenalstown
-

WATERWAYS

-  7 Barrow Navigation Waterway
-

BUS

-  8 Scheduled Bus Services Carlow Town, Bagenalstown, Royal Oak, Leighlinbridge, Ballon, Tullow, Bunclody, Rathvilly and Hacketstown
-  8 Ring a link Community Bus Service

2.2

Destination Performance

2.2.1 Visitor Volume and Value

Tourism has become increasingly important as an industry and socio-economic driver for Ireland, backed by substantial investment in visitor attractions and facilities and by promotion in Ireland and overseas. Ireland as a destination is increasingly popular, with significant growth in overseas and domestic visitor volume and revenue over the 2013-2018 period, as shown in Figure 2.06. Growth in overseas tourist volume continued until 2018, with an increase of 6.5% in that year alone compared to 2017. Comparison data for 2019 has not yet been released by Fáilte Ireland. According to the Irish Tourism Industry Confederation (ITIC) 2019 was however a mixed year for Irish tourism, with strong growth in the early months slowing sharply as the year progressed. Data from ITIC¹ indicates that the tourism industry was worth €9.3 billion in 2019, down 1% on the record high of 2018, the first decline in eight years. Mainland Europe is now Ireland's top performing market, having overtaken Britain in 2018. In terms of volume all markets showed an increase in visitor numbers in 2019 in the ITIC data.

Data from 2013-2018 indicates an increase during that period of over €2bn per annum in overseas visitor revenue (inclusive of revenue from visitors from Northern Ireland), to €5,612m from €3,620m. For the same period there was an increase of €473m in domestic revenue expenditure, to €2,006m from €1,533m.

During the 2014-2018 period the yield per overseas visitor trip to Ireland has increased from €438 to €513, while yield per domestic visitor trip marginally decreased from €190 to €184 over the same period.

“Tourism has become increasingly important as an industry and socio-economic driver for Ireland...”

¹ *Tourism review for 2019 and Outlook for 2020, Irish Tourism Industry Confederation, December 2019*

Volume ('000 visitors)

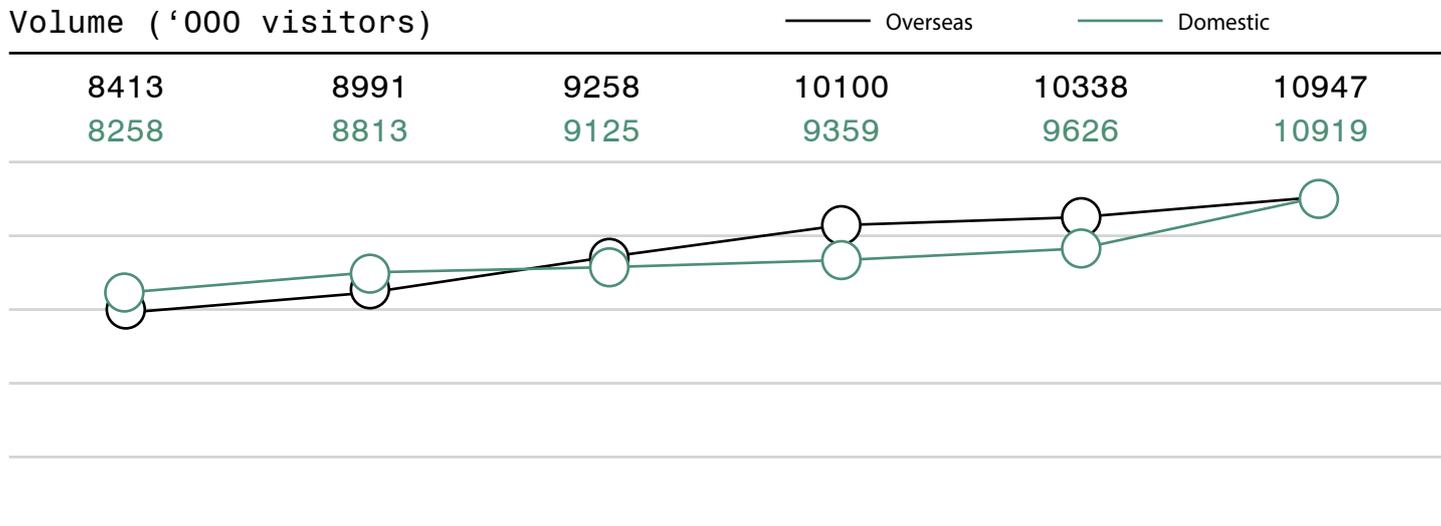


Figure 2-06 Overseas and domestic visitor volume growth to Ireland 2013-2018 (Source Fáilte Ireland)

Revenue (€bn)

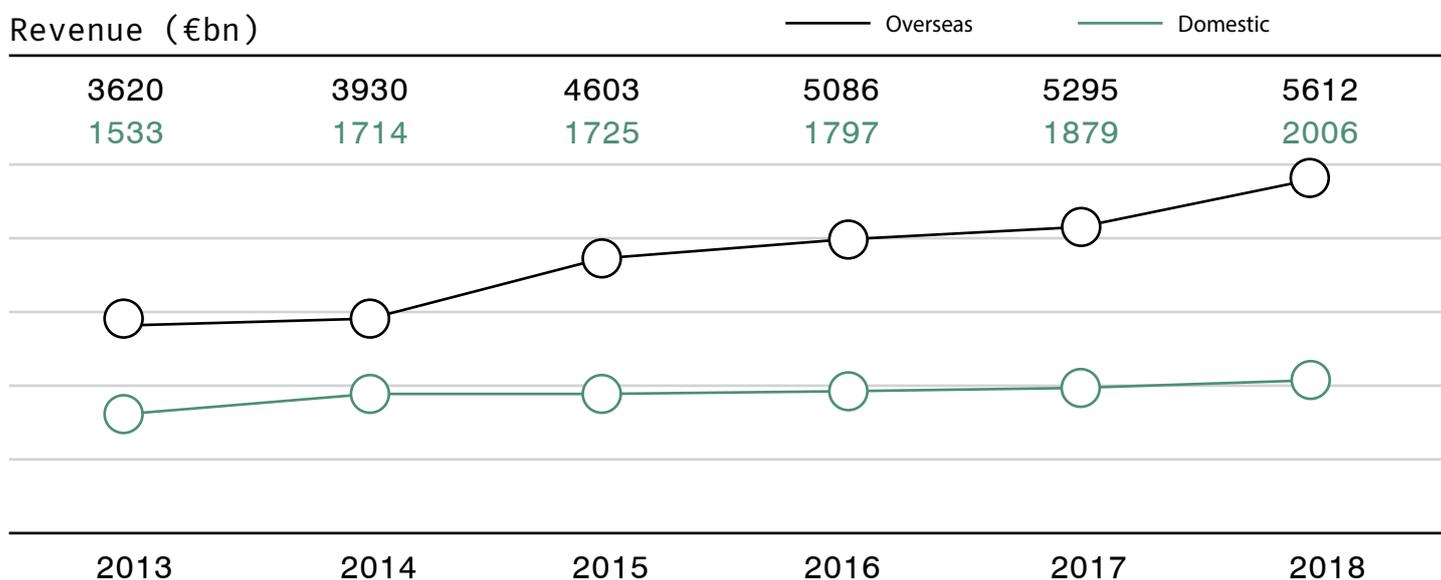


Figure 2-07 Overseas and domestic visitor volume growth to Ireland 2013-2018 (Source Fáilte Ireland)

Until recently the government remained positive with growth envisaged until 2025. In this context the Government revised upwards its projections for visitor numbers and revenue, after targets published in the Tourism Action Plan in 2015 (which targeted €5bn in overseas revenue, 10 million overseas visitors and 250,000 employed in the tourism sector by 2025), were reached seven years in advance. The new headline target is for:

- **Revenue from overseas tourists, excluding carrier receipts, to increase to €6.5 billion in real terms (e.g. excluding the effects of inflation) by 2025, up from €5.2 billion in 2018. +25%**

Secondary targets seek

- **Employment in the tourism sector of 310,000 by 2025, compared to around 260,000 in 2018. +19%**
- **11.6 million tourists visiting Ireland annually by 2025 (tourists are defined as overseas visitors staying at least one night – the figure in 2018 was 9.5 million and 9.7 million in 2019)². +22%**

However, in the context of Covid-19 and Brexit, it can be expected that there will be a significant decline in international visitors during 2020 and 2021, with a slow increase thereafter, which will impact upon revenue and employment targets.

Data provided by Fáilte Ireland for **Ireland's Ancient East** indicate that there were 2.8m overseas tourists visiting the area in 2019 who spent €900m. There were a further 4.2m domestic trips with associated revenue of €0.7bn in 2019. Overseas visitors spend longer on average in Ireland's Ancient East with 5.2 nights than domestic visitors at 2.4 nights. The primary purpose for

overseas visitors to come to Ireland's Ancient East is for a holiday (57%), with a significant amount also coming to visit friends and family (29%), with 11% coming for business reasons³.

The South East Region, within which County Carlow is located, attracted 1,028,000 overseas residents in 2018 who spent €271m, up from €261m in 2017. The region also attracted 1.7m Irish residents who spent €304m, up from €253m in 2017. A further 22,000 visitors from Northern Ireland came to the region, spending €6m in 2018. The region does not generate significant revenue from overseas visitors in comparison to other regions, with only the Border region attracting less. However, the South-East performs well in terms of the number of domestic visitors, with more than most other regions apart from the South-West, and marginally Dublin. However, revenue generated from domestic visitors is higher in the South-West, West and Dublin. Fáilte Ireland estimated that **County Carlow** attracted 79,000 overseas visitors in 2017; (figure 2.09) significant growth since 2013 when the county attracted 11,000 less overseas visitors. Figures 2-08 to 2-10 show the estimated pattern of growth for County Carlow in terms of revenue, volume and yield per visitor between 2013 and 2017. The positive trend reflects that at a national level, albeit with exceptional revenue growth between 2016 and 2017 of over 21% to €45m (figure 2.08).

It is likely that in the early stages of recovery from the current Covid-19 health crisis, the domestic tourism industry will experience earlier opportunities for revival in contrast to international tourism, which may experience a longer-term slump. Following long periods of lockdown, it is anticipated that people will seek out more localised travel opportunities as tourist confidence builds and returns. This could have significant benefits for County Carlow, due to the proximity of Dublin.

² <https://www.gov.ie/en/news/eb8634-new-tourism-targets-set-after-projected-revenue-and-visitor-numbers/>

³ IAE Preliminary data 2019, Fáilte Ireland 2020

Overseas Visitor Revenue

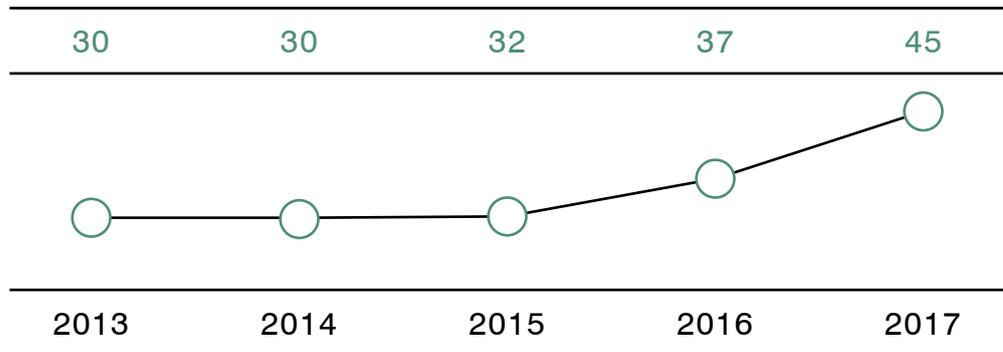


Figure 2-08 Carlow Overseas Visitor Revenue 2013-2017 (€m) (Source Fáilte Ireland)

Overseas Visitor Volume

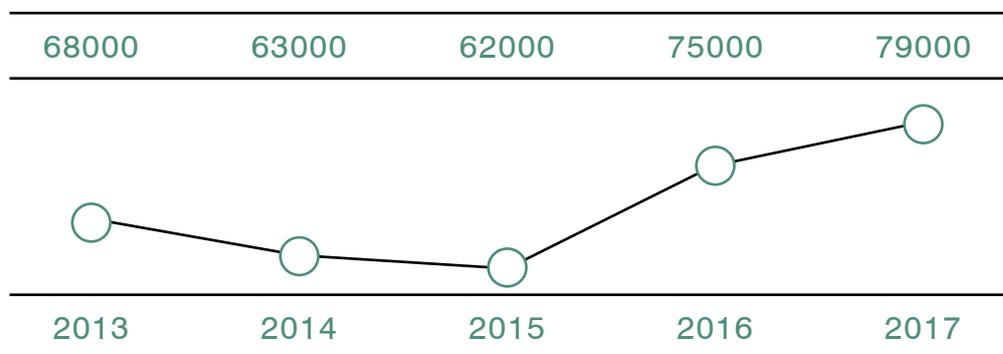


Figure 2-09 Carlow Overseas Visitor Volume 2013-2017 (Source Fáilte Ireland)

Overseas Visitor Yield/Visitor

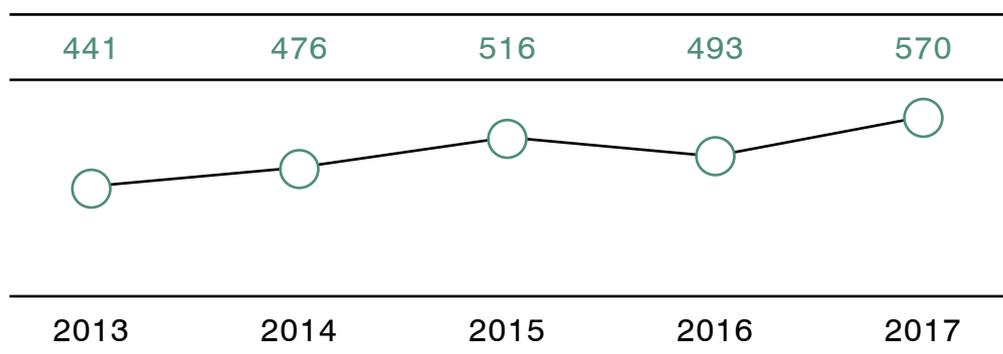


Figure 2-10 Carlow Overseas Visitor Yield/Visitor 2013-2017 (€) (Source Fáilte Ireland)





*Borris House,
Borris Village*

From 2018 onwards **Fáilte Ireland is no longer issuing figures at county level in the previous format of absolute figures**, given the margin of error based on the passenger survey of 10,000. The latest Fáilte Ireland figures available, for 2018, and the future format of county level metrics, show that **County Carlow's share of overseas visitors to Ireland was 1% by volume and less than 0.5% by revenue**. The figure of 1% volume for 2018 would indicate 96,090 overseas visitors, significantly higher than 2017, and the figure of less than 0.5% for revenue, would indicate less than €26m in terms of overseas visitor revenue which is significantly less than the 2017 figure and thus demonstrative of the margin of error. This cannot now be compared to the 2017 figure of 79,000 overseas visitors to the county generating €45m for the local economy.

Statistics for **domestic travel** by Irish residents account for Carlow and Kildare as one region. Combined both counties welcomed 309,000 visitors in 2018 generating revenue of €36 million. The predominantly positive trend is shown in Figures 2-11 to 2-13. This clearly shows a spike in domestic tourism volume and revenue in 2015, a decline in 2016 and continued growth in volume since with revenue staying the same in 2018 as 2017, indicating a decline in yield per domestic visitor in that period, as demonstrated in Figure 2-13.

County Carlow is presently very dependent on domestic tourism with over 82% of bed nights in the Ireland's Ancient East region originating from the domestic and Northern Irish market. However, the economic impact of an international visitor in terms of spend for the county is estimated at €570 as against €117 for a domestic holidaymaker, likely due to the high numbers of visitors to friends and family. For this reason, there is a **national focus on attracting increasing numbers of overseas visitors, which in turn is an objective for County Carlow, perhaps more so in the medium term than the short-term due to the impact of Covid-19**. While attracting domestic visitors remains an important objective, the attraction of increased numbers of overseas visitors enables growth of the visitor economy from a lower volume of visitors.

“...national focus on attracting increasing numbers of overseas visitors, which in turn is an objective for County Carlow, perhaps more so in the medium term than the short-term due to the impact of Covid-19...”



Domestic Tourism Revenue

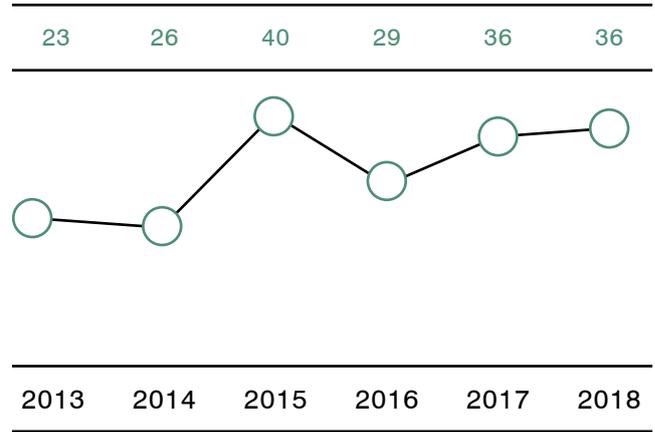


Figure 2-11 Carlow & Kildare Domestic Tourism Revenue 2013-2017 (€m) (Source Fáilte Ireland)

Domestic Tourism Volume

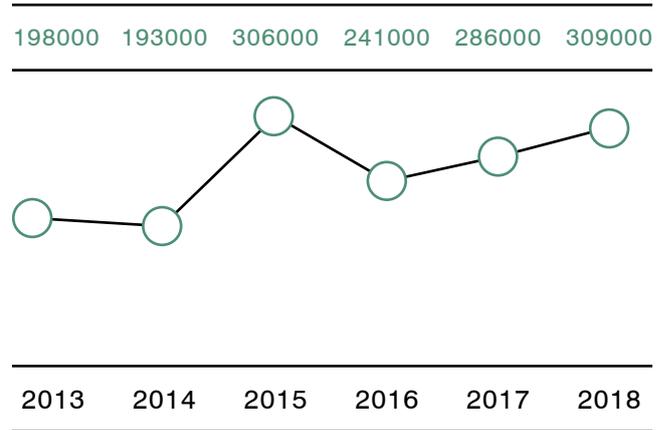


Figure 2-12 Carlow & Kildare Domestic Tourism Volume 2013-2017 (Source Fáilte Ireland)

Domestic Tourism Yield

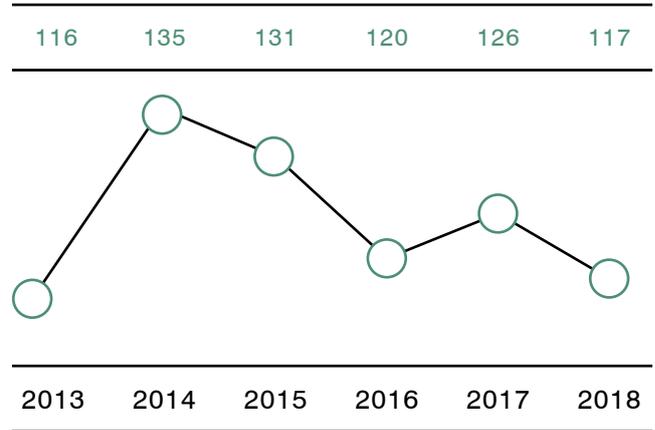


Figure 2-13 Carlow & Kildare Domestic Tourism Yield 2013-2017 (Source Fáilte Ireland)

2.2.2 Visitor Origin and Profile

At a **national level**, **Mainland Europe** represented the largest direct contributor to Ireland in terms of tourism revenue in 2018, accounting for 35% (€1,555m) of the total direct revenue from overseas visitors. This was followed by the North American market at 34% and Britain market at 20%. In terms of volume Mainland Europe represented the largest market, accounting for 37% of the total overseas visitors. This was followed by visitors from Britain at 20% and North America at 20%.

For the **South-East region**, **Mainland Europe** represented the largest direct contributor to the region in terms of tourism revenue in 2018⁴, accounting for 33% (€86m) of the total direct revenue from overseas visitors. This was followed by overseas visitors from Britain at 32% (€83m) and those from North America at 27% (€70m), with visitors from the Rest of the World contributing 8% (€22m). This clearly shows that visitors from Mainland Europe are the most important for the South-East region currently with significant opportunity to grow the North American market, when compared with the national level data.

For **County Carlow**, **Mainland Europe** represented the largest direct contributor to the county in terms of tourism revenue in 2017⁵, representing 49% (€22m) of the total direct revenue from overseas visitors. This was followed by overseas visitors from Britain at 31% (€14m) and those from North America at 18% (€8m), with visitors from the Rest of the World contributing 2% (€1m) as illustrated in Figure 2-14. This clearly shows that visitors from Mainland Europe were the most important for County Carlow pre-Covid-19. There may also be significant opportunity to grow the North American market, when compared with the national level data, post Covid-19 once their economy recovers.

“...South-East region, Mainland Europe represented the largest direct contributor to the region in terms of tourism revenue in 2018, accounting for 33% (€86m) of the total direct revenue from overseas visitors.”

⁴- Latest data available

⁵- Latest data available

In terms of volume Mainland Europe represented the largest market for County Carlow in 2017, accounting for 47% (37,000) of the total overseas visitors. This was followed by visitors from Britain at 38% (30,000) and North America at 10% (8,000), and the Rest of the World at 5% (4,000) as shown in Figure 2-14. The relatively high volume with lower spend from visitors from Britain could indicate that many of these are visiting friends and relatives on their stay.

With 66% of overseas visitors to Ireland including Dublin on their visit⁶ there is an opportunity for the County of Carlow, given its proximate location 90km from Dublin Airport and with motorway, bus and rail and road access to harness this volume of visitors.

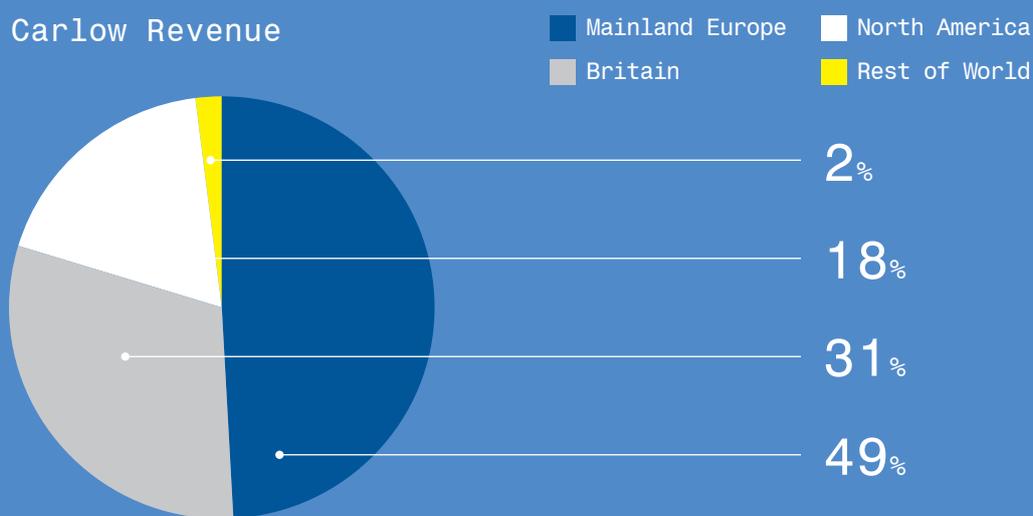


Figure 2-14 County Carlow Overseas Tourism Volume by Market (2018)

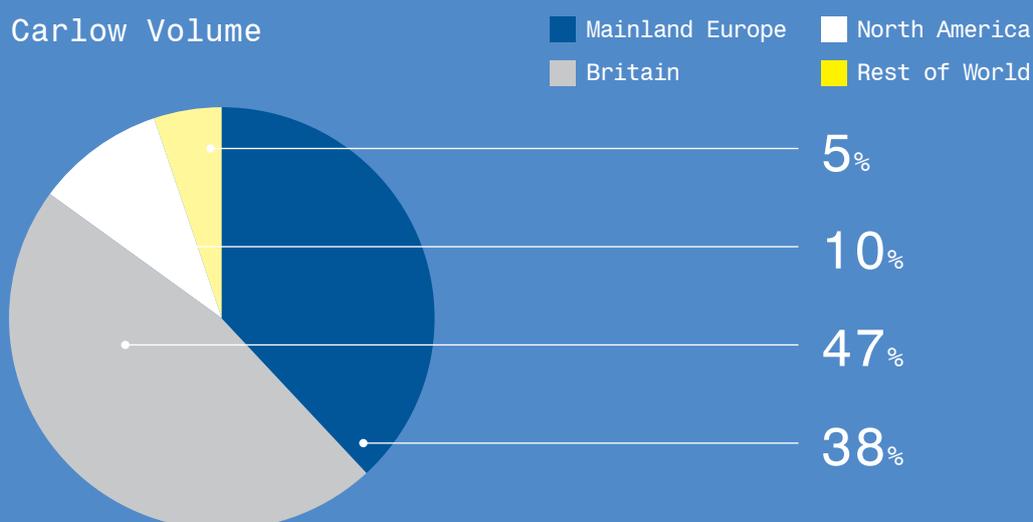


Figure 2-15 County Carlow Overseas Tourism Volume by Market (2018)

6- Source Failte Ireland, Tourism Facts 2018

2.2.3 Tourism Projections and Targets

Perhaps more than many other counties there is an emphasis in County Carlow on more sustainable tourism development, ensuring that negative impacts from tourism are minimised including impacts on the county's heritage and communities, while maximising positive impacts from tourism. With a goal of more responsible tourism development many destinations at a local, regional and national level are **placing an emphasis on revenue growth from visitors over volume growth.**

Were accurate figures available for future years at national level for county-based areas then a balance between ambitions for growth and responsible tourism development suggest a model whereby projections for County Carlow over the lifetime of the strategy would focus on growth in visitor revenue and employment generation over visitor volume, boosting yield per overseas visitor and requiring increased dwell time per visitor. However as outlined earlier from 2018 onwards Fáilte Ireland is no longer issuing figures at county level in this format given the margin of error based on the passenger survey of 10,000. **Therefore, the new system of market share focus means absolute figures cannot be identified with confidence or projected over the lifetime of the plan, nor accurately compared with other counties.**

Discussion with Fáilte Ireland identified metrics of success that could be reviewed over the lifetime of the plan, including:

Bednights: some hotels, guesthouses, bed & breakfasts and other accommodation providers registered with Fáilte Ireland provide returns on the number of bed-nights. The greatest opportunity in growing revenue generated from tourism lies in increasing the number of overnight visitors.

RevPAR, ARR: Revenue per available room (RevPAR) and Average Room Rate (ARR) are also demonstrative of success in driving growth. However, these only relate to hotel accommodation.

Visitor attractions: Fáilte Ireland monitor growth in the number of visitors going to registered attractions. However, this is dependent on visitor attractions making accurate annual returns to Fáilte Ireland. **It is also important to grow the number of attractions in Carlow to provide a wider product base.**

It would be important that success metrics focus on data that can be accurately measured and bednights and visitor attraction numbers are two key metrics. An annual increase in bednights could be a key metric in measuring growth. However, **securing this data would be a difficult task for Carlow Tourism**, as the return of occupancy levels to Fáilte Ireland is not now obligatory as it was for many years. An alternative system could be an opt-in, web-based and anonymous questionnaire, that would satisfy Fáilte Ireland criteria. This could be implemented, with results collated by a data research company, and then transmitted to Carlow Tourism and Fáilte Ireland. Other counties use alternative metrics e.g. ATM transactions in the case of County Kilkenny.

A further important metric of success is **community and visitor satisfaction with the impact of tourism**, with measures in relation to community surveys discussed in Chapter 4.



Carlow County
Museum, Carlow
Town

2.3

Market Analysis

2.3.1 Target Market Segments for Carlow

Carlow sits within the Ireland Ancient East (IAE) regional brand destination. The visitor experience is based on Ireland’s rich built, natural and cultural legacy, made accessible and delivered through stories and interpretation at key historical sites, a significant number of which are owned and managed by the Office of Public Works, such as Altamont and part of St. Mullins (with Carlow County Council owning a significant part of the site). The vision is that *“Ireland’s Ancient East will be an immersive experience of living culture, breath-taking landscape and hidden history made remarkable by vibrant communities, local lore and the authentic character of the real Ireland”*⁷. Bringing this to life will be **new and improved experiences** with a focus on memory

making, storytelling and experience. National investment in IAE development and marketing is a significant opportunity for Carlow to harness with some of the tourism product offer aligned with the vision for the IAE brand and for market segments used by Fáilte Ireland and Tourism Ireland.

There are **nine signature stories/themes**⁸ in development by Fáilte Ireland and the Ireland Ancient East team. The three key story lines which Carlow fits into are: ‘Ancient Ireland’, ‘Sacred Ireland’, and ‘A Tale of Two Worlds’. In addition, there may be future potential with regards to the ‘Sport of Kings’ theme were visitor facilities on the ground developed further, given that within a four mile radius of Leighlinbridge lies the second largest concentration of horse trainers and stables in the country. For the latter Carlow’s Garden and Big Houses Festivals of 2019 including Duckett’s Grove Historic House and Walled Gardens, Huntington Castle, Altamont Gardens, Borris House and Lisnavagh House present an opportunity for promotion as shown in Table 2-01.

Table 2-01 Carlow Product Matching with IAE Themes

IAE Theme	Carlow Product
Ancient Ireland	Brownshill Dolmen with visitors encouraged to discover tombs older than the pyramids from pagan and Celtic times.
Sacred Ireland	St. Mullins, St. Laserian’s Cathedral, Columban Way, Trails of the Saints with connotations to the Land of Saints and Scholars.
A Tale of Two Worlds	Borris House Festival of Writing and Ideas (June), Carlow Garden (July), and Big Houses (October) festivals of 2019, Duckett’s Grove Historic House and Walled Gardens, Borris House, Lisnavagh House, Altamont House and Gardens, Huntington Castle and Gardens, highlighting the contrast between the stories of the big house, the famine and the subsequent emigration success stories. Potential for an Emigrants Trail.
Sport of Kings	Future development potential around Leighlinbridge.

⁷ -Irelands Ancient East – Path to Growth, Fáilte Ireland, 2013, page 8

⁸- These include Sacred Ireland, Tales of Two Worlds, Maritime gateway, High Kings & Heroes, Vikings, Ancient Ireland, The Sport of Kings, Irelands Mystical Waterway, Castle & Conquests

The brand is primarily designed to appeal to the Culturally Curious and Great Escaper customer segments. Despite the volume of potential visitors within the Great Escaper segments, Culturally Curious visitors are identified as having more potential to deliver for the Ireland's Ancient East region. To grow international visitors, Carlow as a destination must ensure that it has **defined itineraries which are saleable experiences**⁹, tourist product that is market ready to include attractions and a tourism offering ready for promotion overseas. Better utilisation by Carlow Tourism members of the Ireland's Ancient East brand and its platforms, which are available to trade at no cost, can ensure more heightened awareness and profile for the destination in the international marketplace.

Carlow Tourism marketing messaging, communications and promotion needs to continue to align with Ireland's Ancient East to ensure exposure in international markets. For Carlow to succeed and grow international visitor numbers, it must implement the objectives of the Ireland's Ancient East brand within the county's tourism sector. Fáilte Ireland estimates that 82% of all visitors to the Ireland's Ancient East region originate in the domestic and Northern Ireland markets¹⁰. In this context, marketing and development initiatives being undertaken by Carlow Tourism in the domestic market place should also reflect the customer segments being pursued by Fáilte Ireland for this sector, allowing the trade to target and influence best prospect customers, and in doing so drive revenue growth to their businesses.

“Carlow Tourism marketing messaging, communications and promotion needs to continue to align with Ireland's Ancient East to ensure exposure in international markets.”

⁹- A saleable experience is a tourism experience that has gone through a Fáilte Ireland process, which makes it fit for purpose for B2B in the international and national marketplaces.

¹⁰- Ireland Ancient East Project Update

Overseas Key Market Segments

While visitors to Ireland come from around the world, there are **four main countries that play a key role in overseas tourism growth** with nearly 70% of all visitors and 60% of all overseas tourism revenue coming from Britain, USA, France and Germany. While Britain and Mainland Europe are **high volume** markets, the USA is a **high yield** market due to the high proportion of holidaymakers (rather than those visiting family, friends or relatives or for business travel), their higher likelihood of staying in a hotel, and longer average stay. The variation in the type of tourist by market can be seen in Figure 2-16. Around a **third of holidaymakers are repeat visitors** which highlights the opportunity to encourage a return visit by ensuring their expectations are exceeded and providing them with a compelling reason to return and recommend visits to others. A further opportunity is to encourage those who may have visited Ireland before to take in the “highlights”, to consider a trip to Carlow on their second and subsequent visits. This trend is reflected in feedback from second- and third-time visitors to Ireland from the North American and Mainland European markets to Carlow Tourist Information Office.

Ireland’s secondary markets include Spain and Italy and the emerging markets include China, Gulf States (GCC) and India.

The **target market for IAE** is the ‘culturally curious’, independent active sight seekers looking to visit new places and expand their experience by exploring landscape, history and culture. **Culturally Curious** tend to be slightly older (40+), are very independently minded and are interested in places of historic and cultural interest. Tourism Ireland have identified 31.9 million visitors across the four key markets - United Kingdom, United States, Germany and France - with 7 million “warm” to Ireland. Culturally curious visitors are identified as having most potential to deliver for the Ireland’s Ancient East region and are key market segments which Tourism Ireland push in the international markets¹¹. While not as high a priority for marketing as Culturally Curious, the unspoilt landscape of the county and remoteness is also ideal for the Great Escapers target market segment who are likely to be attracted to the outdoor activity opportunities. **Great Escapers** are all about getting away from it all, renewing family bonds and spending time together in a beautiful place. They want to come home refreshed and revitalised, their batteries charged¹².

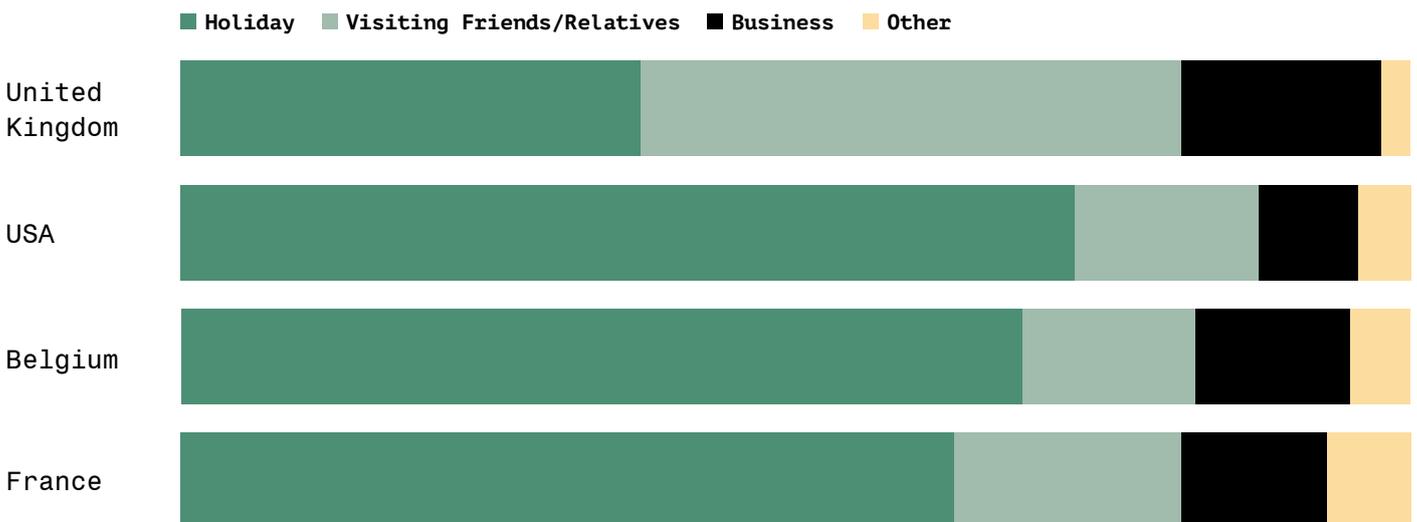


Figure 2-16 Visitor Type by Market 2017 (Source Fáilte Ireland)

11. Growing International Sales – Global Segmentation Toolkit, Fáilte Ireland

12. Driving Growth Through Segmentation, Fáilte Ireland

Domestic Key Market Segments

In 2018 over 59% of the population took a holiday trip in Ireland with over 55% taking a short break, defined as 1-3 nights away. 19% of the population took a long holiday – 4+ nights. Activities engaged in on holidays include: Hiking/Cross Country Walking (26%), National Parks (21%), Houses/Castles (21%), Watersports (20%), Spas (17%), Festivals/Events (17%)¹³, and Gardens (17%). Research showed a high level of satisfaction with holidaying in Ireland with 97% satisfied with their trip¹⁴. Each of the motivators for domestic visitors can be found in County Carlow, even national parks, such as Wicklow National Park, can be visited as part of a day trip from the county.

Over half of all domestic trips taken annually are holiday trips and Irish people take more domestic holiday trips each year than outbound holiday trips. **The domestic market is important for County Carlow, particularly given its proximity to the Dublin area, with five neighbouring counties, and presents an opportunity to extend the season and to drive regional growth.** Domestic visitors are also important for Carlow for festivals and events, short breaks, weddings and for those visiting friends and relatives.

Fáilte Ireland through research have identified two key market segments for the domestic market, which County Carlow has the potential to target, based on the variance of the characteristics and motivators to book a break or holiday. These are shown in Figure 2-17.

Empty Nesters		Pre-teen Families	
More health conscious and spiritual	Interested in landscape, quiet and familiar locations	More adventurous	More prone to stress
Food and drink important	Quality relaxation breaks and to reward themselves	Slowing down, physical health, broadening their minds	More focus on daytime than evening/night time
Pay extra for quality	Holidays = Break in routine, opportunity to pursue hobbies	Outdoor activities, local hospitality, events	Holidays = bonding, escaping daily hassles, recreating childhood experiences

Figure 2-17 Key domestic target markets (Source Fáilte Ireland)

13. Tourism Facts 2018, Fáilte Ireland 2019

14. Fáilte Ireland Domestic Tourism Monitor: Q1-Q4 2018

The domestic market is an important one to focus on to provide an out of season market, enabling many businesses to remain open year-round. As indicated above, the domestic market now represents an increasingly important target market for County Carlow, and provides significant potential, due to the possibility of less overseas travel by Irish people due to Covid-19.

2.3.2 Experience Development

Tourism development, marketing and promotion has seen a transformation in recent years with a trend, in Ireland and internationally, towards more experiential tourism, travel motivated by the desire to connect with a place, its culture and people. Memorable experiences, or the potential for such experiences, can motivate visitors to decide to go to one place or another, to remember the visit and recommend a visit to others afterwards. A memorable tourism experience is inherently personal, engages the senses, makes connections on an emotional, physical, spiritual, intellectual or social level and creates a lasting memory. Consequently, it is essential that the conditions are created in County Carlow for these experiences to happen consistently and importantly to a high quality. Experiences can include physical attractions but also events and activities. Developing experiences is about a combination of natural landscape assets, tourism products, customer service, and stories to create a compelling consumer offer. Fáilte Ireland's 'National Experience Development Framework' guide indicates that the development of experiences is about combining product, service, story and narration, as illustrated in Figure 2-18. **The opportunity for County Carlow is to develop experiences that align with the Ireland's Ancient East brand and that motivate overseas visitors, as well as domestic visitors¹⁵. This will enable Fáilte Ireland to promote Carlow as a compelling visitor destination.**

“The visitor experience is king and it is now widely acknowledged that it is no longer sufficient to sell a tourism product – a memorable experience must also be provided. It is the job of the tourism sector to create the conditions for these experiences to happen consistently and to a very high quality.”

Fáilte Ireland's Tourism Development & Innovation Strategy for Investment 2016 – 2021

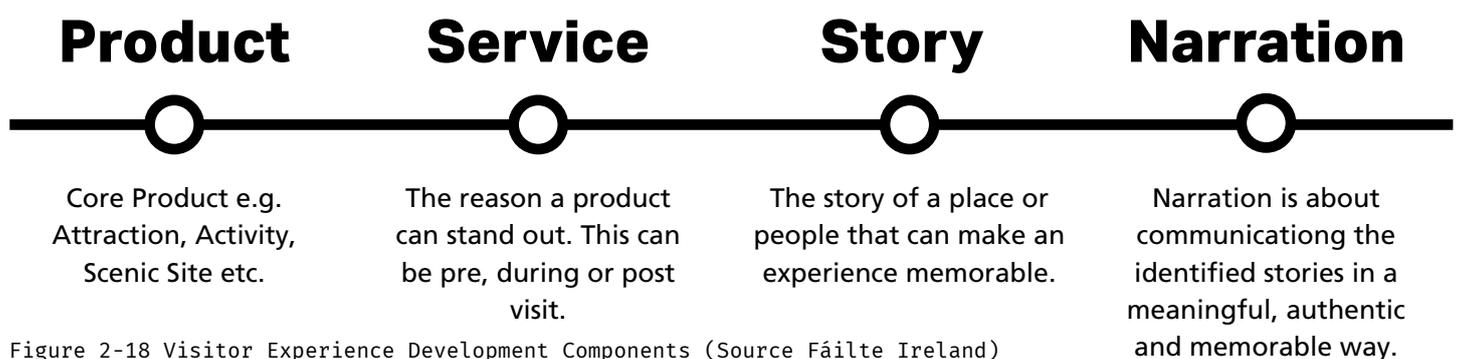


Figure 2-18 Visitor Experience Development Components (Source Fáilte Ireland)

¹⁵- Experiences Explained – A Guide to Understanding and Developing Memorable Tourism Experiences



2.3.3 Brand Analysis

As part of the consultative process a key question was asked about the current county tourism brand “*Carlow – Through the Waters of time*”. As a county Carlow is known by name, but not by what it has to offer. Locally Carlovians are familiar with heritage, water, and the importance of it to the region, but externally and from a tourism perspective, the same awareness does not exist. Feedback from stakeholder and public consultation was not positive towards the **present tagline as it is not thought to accurately convey all the county has to offer**. An online survey undertaken for this report, outlined in Appendix 2, found **81% of those responding were not aware of the current brand**.

At a domestic level Carlow does need to differentiate itself as a destination and accordingly needs a brand. A concern raised in the consultative process was, what does “through the waters” promise? The brand name needs to reflect the tourism offering and presently the one being used does not. **At an international level, Carlow sits within Ireland’s Ancient East and as such does not need a brand but does need immersive visitor experiences that deliver on the Ireland’s Ancient East promise**, particularly around houses and gardens, soft adventure, food and drink.

2.3.4 Digital Marketing Activity

Digital marketing activity is both outsourced and handled in house by Carlow Tourism who are well respected amongst the tourism trade in the county. **Website traffic continues to improve with year on year growth in traffic by over 20%**. Carlow Tourism has a strong social media presence with an annual reach of over one million from Facebook related social media activities. Present strategic planning is general and focused strongly on the promotion of festivals. **The website navigation however needs to be reviewed in terms of user experience to increase conversion.** There are opportunities online which Carlow and its tourism providers are not currently harnessing. These include brand and platform opportunities e.g. presence on Discover Ireland, ie, ireland.com and Ireland’s Ancient East brand to attract domestic and international visitors.



2.3.5 Cooperative Marketing

Fáilte Ireland has initiated several Visitor Experience Development Plans across the country under the respective brands. These are three to five-year commercial development plans for a region, which bring the public and private sector together to drive visitors and revenue to lesser known areas and attractions, especially in the off-peak season. Fáilte Ireland has started work on the ‘**Tale of Two Worlds’ Visitor Experience Development Plan**, which brings together Ireland’s historic houses and gardens, and the period in Ireland’s history of famine and emigration, which, from a Carlow perspective offers a range of opportunities, including an opportunity to focus on a Carlow Emigrant Trail. Some Carlow businesses took part in a bespoke eighteen-month **Great Houses and Gardens Experience Development Programme** as part of the VEDP. This programme looked at the house and garden experiences available across the county including ways to develop guiding, events, cost and revenue management and sales distribution.

The Carlow Garden Trail is one of the key **co-operative initiatives** underway between Carlow Tourism and the tourism sector. The Carlow Garden Trail now includes nineteen gardening attractions, from those at Altamont which welcomed 73,821 visitors in 2019, to smaller gardens, award winning garden centres and forest parks. Other co-operative projects planned to be completed in 2019-2020

under the Town and Village programme, coordinated by Carlow County Council, are: AO storytelling map boards in seven villages, Myshall Heritage Trail, interactive maps in Myshall and Ballon; Information kiosk in St. Mullins, interpretation storytelling panels for sites along St. Laserian’s Trail as part of the Trails of the Saints project and a public art sculpture commemorating the 200th anniversary of John Tyndall’s birth, in his home village of Leighlinbridge. A national radio campaign aired twice in 2019, with the first campaign airing in mid-July over a two-week period targeted at the domestic holiday market period while the second campaign aired prior to and during the National Ploughing Championships to leverage exposure of the county around this key period. This is only possible due to the commitment from key members of the tourism sector who provide financial support towards delivery of the campaigns and funding provided by Carlow LCDDC. Outside of social media, **radio is seen as an important medium to interact with the domestic buyer.**

Carlow County Council and Carlow Tourism have a strong working relationship in jointly progressing the development of new trail experiences for the county e.g. Carlow Trails of the Saints and South Carlow Adventure Trail. Most recently Carlow County Development Partnership and Carlow Tourism have co-operated on developing interpretation panels to animate the Barrow Way long distance walking route.

2.3.6 Promotion

Carlow County Council's *Corporate Plan* and *Local Economic and Community Plan* identify goals related to the development and promotion of tourism within the county and as part of the wider region and the Ireland's Ancient East destination. Carlow Tourism prepares an annual marketing and development action plan focusing on a variety of media including digital marketing activity, PR, press and radio advertising, consumer fair attendance, print production and festival organisation. Within the resources available there would not appear to be funding to strongly invest in proactively attracting international visitors. **It is not the responsibility of Carlow Tourism alone, but also key tourism operators to engage proactively and support the authority by creating and delivering saleable experiences which can be marketed internationally.** For international markets, the lead-in time is different to that of domestic tourism, with lead-in for planning, programming and promotion, particularly with wholesalers/ tour operators up to two years out.

2.4

Stakeholder Perception of Tourism in Carlow

This section outlines views of key tourism stakeholders including Tourism Ireland, Fáilte Ireland, ITOA and CTTC. Views from public consultation workshops undertaken in Carlow Town, Borris and Tullow are outlined in a separate *Workshop Outcomes Report*, which can be found at the following link: www.carlowtourism.com/workshopoutcomes and have been taken into consideration when preparing this report. To gauge perceptions of the domestic market to County Carlow as a destination an online survey was issued during July and November 2019 with 361 responses. The results of this survey are outlined in Appendix 2.





Duckett's Grove

2.4.1 Key Tourism Stakeholders



Tourism Ireland¹⁶

Product infrastructure needs to be in place before going to market. Carlow needs to be market ready before investing in international promotion.

- **The county tourism brand – ‘Carlow through the waters of time’ – would not resonate in the marketplace and all international marketing campaigns in international market offices are under the Ireland’s Ancient East destination brand.** Carlow must ensure the product offering/ itineraries are saleable experiences and align with the themes of the Ireland’s Ancient East brand.
- **Marketing methodology, via digital campaigns are storytelling and images,** sourced via Tourism Ireland content pool which Carlow can submit to any time at no significant cost.
- **Carlow needs to create awareness/ communicate via the routes to market,** e.g. via Fáilte Ireland, Commercial Division, by creating potential itineraries or even collaborating with a neighbouring county. **Carlow needs to define authentic saleable experiences.** In building itineraries include distances from one place to the next and within the county “signage” is key for overseas visitors.
- If Carlow is seriously interested in actively promoting to the **Chinese market** tourism operators and stakeholders need to complete the Get Market Ready training programmes delivered by Fáilte Ireland. Chinese visitors are typically on a combined UK and Ireland coach tour visiting iconic visitor attractions. UAE and Indian market are mainly FIT’s. Recent interest in farm visits which could be an opportunity for Carlow.
- To encourage more international visitors to the county from the **USA & Canadian markets,** would require investments and definition of some very specific attraction(s) with nearby accommodation. Must be outstanding and interesting narrative around the castles. The key product interest for the USA would be **castles and gardens.** Would see Carlow as being more suitable to niche and FIT’s as the USA market tends to visit the South West & Dublin more than the South East.
- To encourage more international visitors to the county from **Great Britain,** would require **investments and definition of some very specific attraction(s)/activities with nearby accommodation,** aligned within Ireland’s Ancient East themes and working with the themes Tourism Ireland are pushing in the GB market and others such as: Soft Adventure, Food & Drink, Built Heritage, Living Culture – Music & Pubs, Film & Screen Tourism.

¹⁶ – Interviews with David Boyce, Head of Middle East, Asia and Emerging Markets, Billy Condon: Vice President USA & Canada, Judith Cassidy: Deputy Head for Great Britain, Monica McLaverty: Manager Southern Europe, Finola O Mahony: Head of Europe

- Visitors from **France** will not spend more than two days on the east coast, mainly Kilkenny, and then tend to head west. To grow International visitors from the French market, Carlow as a niche product would be more suitable to FIT's as 56% of visitors from France use a car and length of stay is 10 days. Visitors from the French and Southern Europe markets tend to book through wholesaler and tour operators. **Within Europe all campaigns and funding are strongly focused on Culturally Curious market segment for which Carlow's experience offering is a perfect fit.**
- Some European markets e.g. **Germany** and **France** are more price sensitive and they have seen a swing in business moving to Meath and Wicklow from Dublin City due to price and availability, although this trend is partially reversing as Dublin's accommodation capacity increases. **Carlow could be pushed as on "Dublin's Doorstep".**
- **Itineraries need to be defined, supported by investment by tourism stakeholders, to get buy in for tour operators to programme the destination.** Major calling in the market for Great Houses and Gardens.
- **As the region is not known suggests a strong presence at Meitheal and education forum workshop.** Start with ITOA members who handle over 736,000 visitors to Ireland via a region-based workshop/ education forum and an experiential programme. Tourism providers within the region must be educated/trained to present and sell in international markets. When market ready, important for tourism providers to participate in Regional Roadshows which are operated in the international marketplace. Carlow has good proximity to the access points such as Rosslare and could look at partnering with Stena Line.
- **Recommendations to increase international tourism would be the development of a flagship attraction,** in tandem with a visitor centre with the emigration story, castle story, notable denizens, shop, crafts etc.
- **Culturally Curious and Great Escapers remain the best prospect segments – 42% travel between October and March – they see the island of Ireland as a year-round destination and many are happy to travel at any time of the year. Visits to the South-East region tend to be 48 hours.**

2.4.1 Key Tourism Stakeholders



- **Carlow has much to offer as a tourism destination.** Unspoilt, rural landscapes, mountains and rivers provide a great setting for a range of outdoor activities. Ireland's Ancient East's key selling point is its rich heritage and captivating history and Carlow, with its collection of historic houses, gardens and historic sites plays a key role in telling this story to international and domestic visitors.
- **At a domestic level Carlow does need to differentiate itself as a destination.** A concern on this brand is what does 'through the waters of time' promise? The brand name needs to reflect the tourism offering and not sure this does. At an international level, Carlow sits within Ireland's Ancient East and as such does not need a brand but rather a series of brilliant visitor experiences that deliver the Ireland's Ancient East promise particularly around houses and gardens.
- **Key product and experiences required to encourage more overseas visitors to the county** would be a cluster of world class visitor experiences accessible by day and by night and appropriate visitor facilities e.g. food and drink offerings, accommodation etc. For example:
 - » **Experiential visitor experiences that make Carlow's living and historical culture accessible using authentic stories as a differentiator;**
 - » **Unique visitor experiences based on "living" the history;**
 - » **Accessible experiences for the wider markets** e.g. providing the visitor with interpretation in the first language of the target audience, e.g. in English, French, German, Spanish and Italian;
 - » **Developing an evening economy to provide a range of attractive options** (separate to food and drink) between 5pm and 8pm;
 - » **Good quality food and drink experiences** featuring Irish produce available across the day and meeting all needs, snack, lunches, dinners, markets, authentic good value and high-end treats;
 - » **A variety of accommodation types** with enough capacity to meet tourism demand;
 - » **A wide variety of attractive retail options;**
 - » **A calendar of attractive and accessible festivals and events.**
- **Itineraries or attractions that should be prioritised for investment to encourage greater number of visitors include:**
 - » Existing key strategic assets to further enhance the visitor experience e.g. Duckett's Grove, Altamont Gardens;
 - » Attractions with the capacity and capability to attract increased overseas visitors;
 - » Carlow Garden Trail;
 - » Food and drink;
 - » Outdoor activities particularly walking and hiking.

- **Fáilte Ireland initiatives relevant to County Carlow include:** *Destination Towns, Platforms for Growth Investment Programme, Regional Festivals and Participative Events Programme and the Festival Innovation Programme.* In addition, Fáilte Ireland partnered with the Department of Rural and Community Development to provide funding of almost €11million for 78 projects across 24 counties – including Carlow – under Measure 2 of the 2018 Outdoor Recreation Infrastructure Scheme.
- **A range of business supports are available for individual operators to help them develop visitor experiences. These include:**
 - » Register for the Trade Portal to hear about trade events and business supports¹⁷.
 - » Utilise the IAE toolkits for tourism businesses: *Storytelling Interpretation – How to Help Visitors Experience Your Story, Food and Drink Visitor Experiences, Activity Experiences, Craft Visitor Experiences*¹⁸.
 - » Develop experiences that are saleable for the international market by working with the IAE team.
 - » *Download Business Supports Guide*¹⁹.
 - » View research on managing sales channels for international growth²⁰.
 - » View funding options²¹.
- **Opportunities for County Carlow to connect and brand existing and potential new offerings within the county to the Ireland’s Ancient East brand include:**
 - » Apply for usage of the IAE brand - email info@irelandsancienteast.ie and they will send the brand charter and guidelines.
 - » Get listed on the consumer websites <http://www.Failteireland.ie/get-listed.aspx>
 - » Submit festivals and events through the trade portal <https://www.Failteirelandevents.ie/#/>
 - » Utilise Ireland’s Ancient East social channels
 - » Facebook www.facebook.com/IrelandsAncientEast
 - » Twitter @ancienteastIRL
 - » Instagram @irelandsancienteast
 - » Register for Ireland’s Content Pool to access copyright-free images free of charge <https://www.irelandscontentpool.com>
 - » Cross-selling and working with other attractions, activity providers and hotels across the county to raise awareness and increase dwell time.

17- <https://tradeportal.Failteireland.ie/>

18- <http://www.Failteireland.ie/Ireland-s-Ancient-East/Ireland-s-Ancient-East-Toolkits-for-Tourism-Busine.aspx>

19- http://www.Failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/Brexit/Training_Supports/Business%20Supports/Failte-Ireland-Business-Supports-Guide.pdf

20- <http://www.Failteireland.ie/International-sales/Managing-sales-channels-for-international-growth.aspx>

21- <http://www.Failteireland.ie/Supports/Identify-Available-Funding.aspx>

2.4.1 Key Tourism Stakeholders



Perspectives from members of ITOA include:

Carlow brand “Carlow: Through the Waters of Time” – means nothing to a potential international audience as Ireland is marketed overseas under the IAE brand. **Recommends relaunch to ITOA members of what there is in the county particularly products which are saleable and marketable and offer value for money.**

The destination is squashed between Kilkenny and Wicklow. Kilkenny is the magnet as it is known. **Carlow would be considered as the second option as cheaper.** Perception in international markets is that Ireland has become expensive.

For an operator such as Abbey to market a destination such as County Carlow more, they need to have saleable experiences to market internationally. For tour series could be a cheaper option as capacity and price could be more attractive. Highly marketable internationally are whole experiential offerings – meet the locals, crafts, community involvement – offering of ‘memorable moments’;

Coach tour market need lunch stops which are ‘group friendly’.

Carlow does not feature on CIE Tours. CIE teams are only aware of Altamont Gardens and Mount Wolseley Hotel, Spa and Golf Resort. Challenge for Carlow is to stand out amongst wide offering in Ireland. **Opportunity may be those markets that**

want to avoid mass tourism destinations. Could do well as a first stop from Dublin.

Vagabond Tours are Ireland’s leading small tour company with a 99% USA market and using 12 pax fully guided tours. Tours currently focus on west, south-west and Northern Ireland. Activities focus on hiking with kayaking and cycling add-ons. They stay in great houses, castles and alternative accommodation. Looking at a south-east tour which could include Carlow.

Suggest **Carlow activity providers develop itineraries** that use the rail connection to Dublin for one or multi day tours e.g. transport, accommodation, kayaking and brewery tour.

Product priorities are culture, history e.g. great houses and gardens, drink and distilleries, light activities – e.g. soft adventure – easy walking, cycling, and water sports.

Attractions and product need to be market ready to entice international visitors to include audio and language facilities. Tourism information collateral should also be translated where relevant.

Key challenge is that no one knows about Carlow product, education on the available product, experiences in the form of an itinerary should be discovered by ITOA members to explore the possibility of growing international visitors.

2.4.1 Key Tourism Stakeholders



There are **challenges to using Carlow as a tourism destination for both domestic and international tourism and inclusion on itineraries for domestic coach operators.**

- Limitation with driving hours are 8 or 10 hours' maximum a day.
- Depending on the type of business and length of tour could prohibit inclusion as Carlow is too near Dublin and passing through not an option due to having to exit the motorway.
- Pricing and incentives encourage operators to include a destination on an itinerary along with incentive for participants by including added value.
- Lack of known dedicated coach parking in town centres and/or meet and greet tourism personnel, could be done by volunteers. Consider securing town 'Coach Friendly' status from the CTTC of Ireland.
- **To attract coach tour business, Carlow could prove attractive as potentially more competitive room rates available or could be a lunch stop as part of an itinerary.**



Arboretum Home and Garden Heaven





*River Barrow at St.
Mullins*



Bagenalstown

SWOT ANALYSIS & DEVELOPMENT PRIORITIES

3.1

Strengths, Weaknesses, Opportunities, Threats

Destination analysis research undertaken, in tandem with analysis of the community workshops and stakeholder meetings, has enabled a strong understanding to be formed of the current issues and opportunities for County Carlow. Drawing on these sources the SWOT analysis is presented below under headings of:

- Visitor Experience and Product Development
- Organisation and Support
- Access and Market Awareness



Altamont Gardens

Strengths

James Malone of Malone's
Fruit Farm and Chairperson
of Carlow Farmers Market



Visitor Experience and Product Development

Unspoilt, natural and peaceful landscape, with a variety of terrain from mountains to rivers and countryside and beautiful views

Not over-run with visitors – still a sense of being able to get off the beaten track

Range of recreational opportunity - walking, cycling, kayaking, golf, angling, equestrian; high quality outdoor activity providers; and range and type of long and short distance walking routes

Big houses and gardens offer, aligned with *Ireland's Ancient East themes*

Tranquil and attractive rural towns and villages, high quality and quiet road network

Carlow people offer a friendly welcome and strong sense of community

VISUAL is Ireland's largest white cube gallery in the country, with world calibre projects

Nationally significant ecclesiastical heritage (St. Mullins, St. Laserian's Cathedral, Old Leighlin, the Columban Way)

Year-round calendar of evolving festivals and events

International achievers and characters, such as John Tyndall, Samuel Haughton, Walt Disney, William Desmond Taylor, Myles Keogh, Peter Fenelon Collier, Michael Flatley

Range of touring trails developed in the county, with brochures downloadable from Carlow Tourism website including app

Rural nature of Carlow's tourism offering, and the location of main natural and physical attractions means tourism benefits are dispersed throughout the county

Presence of two third level colleges in the county, attracting a strong cohort of overseas students coupled with vibrant EFL sector

Organisation and Support

Carlow Tourism well-respected, with strong partnership model

OPW developing Altamont, in partnership with Carlow County Council, Carlow Tourism and local stakeholders

Active involvement of local communities in tourism and recreation development

Financial support for capital funding projects from Carlow County Council, Carlow LCDC, CCDE, Fáilte Ireland and the Departments of Rural and Community Development and Transport, Tourism and Sport

Range of visitor accommodation, including hotels which are re-investing in product

Strength of buy in towards membership and co-operative tourism activity, from all tourism sectors to Carlow Tourism, one of the strongest countrywide on a pro-rata basis given the size of the sector

Access and Market Awareness

Strategic location, 90km from Dublin City/ Airport and from Rosslare

Good accessibility from and to surrounding counties, a base for touring

Located on national rail and bus network, offering opportunities for Dublin day tours

Good value for money, in comparison to Dublin and Kilkenny

St. Lasarian' Cathedral, Old Leighlin - Carlow's oldest working building



Weaknesses

Visitor Experience and Product Development

Lack of flagship visitor attraction of regional importance to attract visitors to the county and/or Carlow Town

Lack of accommodation in the south of the county, lack of conference venues, need for more budget accommodation

Existing visitor attractions not optimised, such as Altamont House and Gardens, Duckett's Grove, St. Mullins, Brownhill Dolmen, and sites along the Trail of the Saints

Need for enhanced high-quality dining offer in Carlow Town and evening entertainment in some towns and villages

Need for improved public realm in some towns and villages

Need for improved parking facilities, for recreation and visitor attractions and for picnic stops at scenic places e.g. on the way to Nine Stones/ Mount Leinster

Inadequate product bundling

Lack of a dedicated craft centre



Rowing on the River Barrow in Carlow Town.



Carlow Castle

Organisation and Support

Lack of awareness amongst Carlow tourism trade of things to see and do in the county

Need for collaboration with neighbouring counties to promote wider tourism offer

Fragmentation of Carlow Tourism function with need for efficient resourcing under one umbrella

Some tourism businesses opt not to join as members of Carlow Tourism, restricting their access to marketing initiatives and raising both their own and the county's profile despite a low membership fee

Limited visitor revenue accruing to some communities, due to the absence of tourism facilities including cafés, accommodation, and saleable experiences

Access and Market Awareness

Unclear market positioning, with current strapline lacking resonance in the market and does not reflect the offer

Motorway network and high-quality regional roads means people pass through the county resulting in corridor tourism

Lack of approach signage on the motorway network for Blackstairs and Barrow and key visitor experiences e.g. VISUAL, Oak Park, Altamont Gardens, Duckett's Grove, Brownshill Dolmen (all in close proximity to junctions 4, 5 and 6 off the M9), poor directional signage within the county and Carlow Town, need for enhanced signage in some towns and villages; need for improved heritage interpretation signage

Lack of public transport network within the county, e.g. linking Carlow Town/rail and bus network to attractions

Inconsistent listing of product on DiscoverIreland.ie



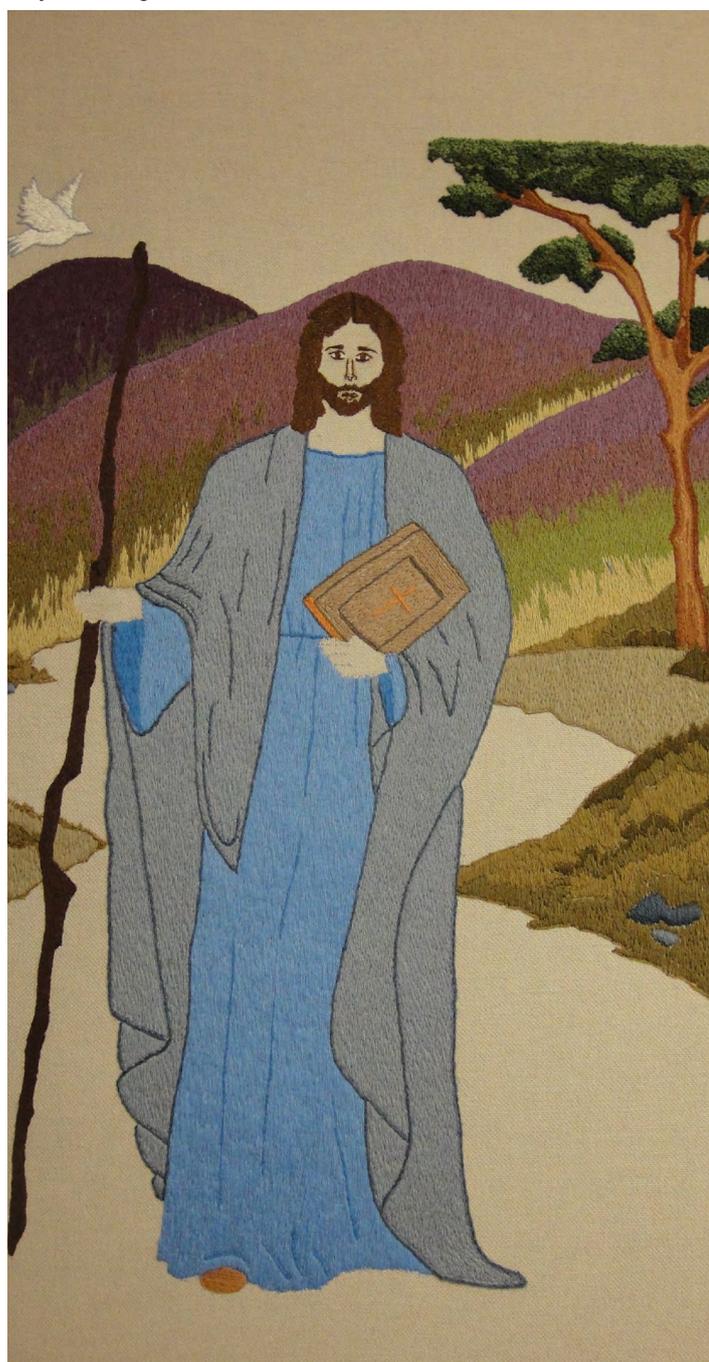
Opening Celebrations to mark Carlow Arts Festival



Delta Sensory Gardens

Opportunities

Art Tapestry of St. Columbanus on display in Myshall, along the Columban way walking route



Visitor Experience and Product Development

Cultural Quarter: potential for Cultural Quarter in Carlow Town to include VISUAL, Carlow College, St. Patrick's, Carlow County Museum, Carlow Cathedral, Carlow Library, Carlow Tourist Office

Flagship Attraction: a feasibility study of County Carlow Art Science Visitor Experience in Carlow Town which links the industrial and scientific historic sites, ancestors and experiences throughout County Carlow²²

Big Houses and Gardens: potential for further enhancement of significant sites including Altamont Gardens and Duckett's Grove, Borris House, Lisnavagh House, and Huntington Castle in partnership with public and private sectors, and Carlow Garden Trail to include Big Houses;

Gardens: potential to support the private sector to develop day tour or multi day tour packages to include transport (small group, bus and/or train), accommodation and garden tours/experiences e.g. flower arranging workshops, lectures; opportunity for Carlow Gardens Experience Tour and combine with theatre and events

Ecclesiastical: St. Mullins could be developed in partnership with OPW. Interpretation could be provided at key ecclesiastical sites with a one-day spiritual highlights trail for key sites;

Food and Drink: potential to harness opportunities of Fáilte Ireland's Taste the Island campaign, including relaunch of a food and drink trail in tandem with the establishment of food and drink network, bundle offers and itineraries involving Carlow's food and drink product

Castles, Forts and Dolmens: opportunity for a Carlow Castles Trail, enhancement of key sites such as Carlow Castle with river linkages, access and interpretation of

Brownhill Dolmen, Clonmore Castle and Monastic Site, Norman motte at St. Mullins

Opportunities to be considered in the context of the *Carlow Outdoor Recreation Strategy*:

Blackstairs: potential for a mountain adventure centre that could be ‘pitched for’ by different communities and have multiple uses across arts, heritage and culture; and to consider development of a compelling range of facilities that match the visitor profile that would experience the mountain range.

Barrow, Burrin and Slaney: potential for enhancement of Barrow as a spine for tourism through delivery of key objectives of the *Barrow Corridor Recreational, Tourism and Commercial Product Identification Study* in partnership with Waterways Ireland and Carlow Sports Partnership, opportunity to engage with Waterways Ireland regarding industrial heritage and a Greenway suited to the needs of the River Barrow or an on-water trail. Opportunity for linkages from Tullow to the River Slaney and river-based activities at Tullow, a ‘Rathvilly River Trail’, riverside activity offers at Leighlinbridge e.g. water-sports facilities, universal access angling, and walking. Position Carlow Town as a hub for the Barrow Way long distance walking route.

Cycling and Walking: potential for a 3km off-road link between South Leinster Way at Kildavin and Wicklow Way at Clonegal; to explore opportunities for better access to walks from towns and villages as outlined in the *Carlow Outdoor Recreation Strategy*; to position Borris (by implementing measures outlined in ‘*Borris Our Vision*’ Report) and Myshall as walking hubs; to identify opportunities for new loop walks from the Barrow, South Leinster Way and Wicklow Way; to engage with Kilkenny and Wexford

County Councils to develop new bridge over the River Barrow at St. Mullins and along the Wexford stretch of the river, enabling looped cycle and walking routes to New Ross; website and downloadable apps/leaflets for walking and cycling routes; to promote Hidden Sky Road cycle route; ‘Blackstairs Cycling Circuit’ and link/promote with nearby attractions and accommodation; ‘Columban Way’ walking route; to investigate feasibility of Bagenalstown-Palace East/New Ross Greenway via old Great Southern & Western Railway network.

Festivals and events: potential to further develop Big Houses Festival; to support the private sector to develop accommodation and travel packages with each festival; to invest in further online promotion of all festivals and existing events such as Carlow Garden Festival, Carlow Arts Festival; to further develop the international appeal of the current ‘Snowdrops’ festival to help seasonality; to consider a Carlow Outdoor Adventure Festival, in the context of the *Carlow Outdoor Recreation Strategy*; to consider Ballon’s concept of climate change/eco/green festival to a county-wide event; to support private sector to develop a Carlow Adventure event similar in scale to Reeks 5, that drives off/shoulder season visitors

Carlow Achievers: potential for a Carlow International Achievers Festival; and for a Carlow Emigrant Trail

22- Similar attractions W5 in Belfast, and *We The Curious* in Bristol attract over 300,000 visitors each year.

Opportunities



Alan Foley at the Step House Hotel with a confit of local free range pork belly

Organisation and Support

Review of membership rates of Carlow Tourism and criteria to increase funding to enable more proactive engagement with a focus on driving domestic tourism in the short term, and international business in the medium term due to COVID-19.

Enhanced community involvement in tourism development and decision making

Community and trade awareness through familiarisation and open days

Development of an evening economy through collaborative engagement with tourism trade

Defined roles for Carlow County Council, Carlow LCDC/LAG, CCDB, Fáilte Ireland and Carlow Tourism for tourism development and promotion with structured marketing budget for Carlow Tourism



Blackstairs Mountains

Access and Market Awareness

Relaunch of Carlow Tourism brand in the domestic market with use of new strapline that captures the Carlow offer

Proximity of Carlow to Dublin, Rosslare and domestic audience of surrounding counties;

Development of a clear County Carlow destination proposition based on available visitor experience and targeted to the Culturally Curious, Great Escapers and domestic market segments

Development of itineraries based on market-ready saleable experiences for overnight and day tours that are aligned with Ireland's Ancient East themes e.g. rail tours from Dublin, stop-offs en-route to Kilkenny, day coach tours from Dublin based around transport, accommodation and attractions. Priorities are existing key strategic assets e.g. Duckett's Grove, Altamont Gardens; attractions with the capacity and capability to attract increased overseas visitors; Carlow Garden Trail; Food and drink; outdoor activities particularly walking and hiking

Better public transport linking visitor hubs to attractions, activities and walking routes – potential for pilot collaborative project with Ring-a-Link and tourism providers, plus additional Carlow Day Tour concept

Targeting of large corporate companies in Dublin e.g. Facebook and Google for weekend activities and entertainment

Ireland only English-speaking country in Europe post-Brexit. Significant opportunity for the vibrant EFL sector in the county and two third level colleges who offer overseas student programmes

Local education of what is on offer in Carlow e.g. 'spend a day in Carlow'

Identification of collaborative marketing opportunities with neighbouring counties e.g. Carlow as an add on destination to Kilkenny as some tour operators priced out of Kilkenny accommodation, collaborative marketing with Wexford for the Blackstairs

Clustering and packaging of visitor experiences e.g. itineraries with tour operators

Itinerary based fam visits for ITOA members to experience market-ready Carlow product e.g. Big Houses and Gardens

Drive awareness of Carlow offer through use of **social media and digital influencers**

Use of **embedded high-quality videos** to communicate the Carlow offer



Fenagh Village

Threats



Aghade Bridge

Visitor Experience and Product Development

Inadequate development of visitor attractions and accommodation sector in line with market demand

Competition from other destinations with similar attractions

Organisation and Support

Decreasing international competitiveness due to vat rate

Inadequate buy-in to collaborative marketing approach/awareness of tourism opportunity leading to comparative loss of market share and economic decline

Insufficient collaboration between Carlow trade to develop clusters and visitor experience packages

Lack of economic benefit from tourism accruing to some communities leading to disaffection with tourism and continued population decline

Access and Market Awareness

Carlow not thought of as a tourism destination by domestic/overseas visitors and tour operators

Potential of Brexit and Covid-19 to impact on overseas visitors, Northern Ireland visitors, and domestic revenue

Lack of market ready products and experiences corresponding to Ireland's Ancient East target markets and themes, leading to missed opportunities for promotion

3.2

Tourism Development Priorities

The consultation and research that informed the baseline study has generated a wide breadth of ideas, issues and opportunities that will influence the direction of the County Carlow Tourism Strategy 2020-2025. Several key strategic principles for tourism development have emerged:

- The natural built and cultural heritage of County Carlow are its primary tourism assets and must be protected from inappropriate development, including tourism development, to protect them for current and future generations
- County Carlow is part of Ireland's Ancient East and its development proposals and marketing strategy must align and work with the overarching destination brand to enable effective leverage of marketing and business supports
- Existing visitor numbers are heavily weighted towards the domestic market and these are important visitors, contributing off peak and shoulder visits as well as word of mouth recommendations. Domestic visitors also provide an opportunity for County Carlow considering the impact of Covid-19
- Proposals of the tourism strategy must contribute to making better places to live in and to visit. Proposals will need to respect and closely consider improving the quality of life of residents. The strategy will seek to prioritise those that both benefit local quality of life as well as the local economy
- There is a long-standing need to develop a flagship attraction in County Carlow, with this highlighted as an objective in the 2000-2006 *Tourism Development Strategy for County Carlow*. There needs to be an anchor, a hook that can transform visitor awareness of the county, with none of the current attractions currently fulfilling this role
- There is opportunity for experience and product development, including Altamont Gardens, Duckett's Grove, St. Mullins, VISUAL (visitor experience plan), a potential science/industrial heritage museum for Carlow Town, the Blackstairs and the Barrow
- Currently most of the tourism product is in the north of the county, while most of the most attractive scenery is in the south with a need to identify the most appropriate way of addressing this imbalance
- Visitors do not recognise county borders. County Carlow has strong cultural and functional links east to Wicklow, west across the Barrow to Kilkenny, south across the Blackstairs to Wexford and north and north-west to Kildare and Laois, connecting to the wider Ireland's Ancient East experience
- A need to identify the key places of focus and key projects that will instigate a transformation in awareness of the county's visitor experiences
- Building on the success of the stakeholder workshop and existing partnerships, the strategy will seek to further develop cross-county tourism collaboration and community involvement
- Marketing must reflect the offer of the county and focus on key target segments, providing engaging marketing content
- The business of managing developing and promoting tourism in the county must be adequately resourced to ensure sufficient capacity



VISION, GOALS, RECOMMENDATIONS AND ACTIONS

4.1

Introduction

This strategy is informed by the 2030 Agenda for Sustainable Development landscape. In 2015 world leaders adopted the 17 Sustainable Development Goals (SDGs), which came into force on the 1st January 2016. Each country will, over the 2015-2030 timeframe, act to implement these goals, promoting prosperity and ending poverty while protecting the planet.

The natural built and cultural heritage of County Carlow are its primary tourism assets and must be protected from inappropriate development, including tourism development, to safeguard them for current and future generations. Negative impacts of tourism must be minimised; while positive impacts harnessed to benefit local communities and economies, and the heritage of County Carlow. Implementation of the tourism strategy must contribute to making better places to live in and

to visit within County Carlow, and where possible contribute to the wider objectives of the SDGs.

Carlow County Council was chosen as one of twelve leaders in the state for 2020 to drive forward the SDGs; responsible for raising awareness and overseeing the national implementation of the 2030 agenda, by highlighting practical ways in which communities and organisations can contribute²³. The United Nations World Tourism Organisation (UNWTO) developed the **Tourism and the Sustainable Development Goals** programme and the www.tourism4sdgs.org platform as a tool to share solutions and policy recommendations

The overall vision, objectives and actions outlined hereafter have therefore been developed with their potential to contribute to the SDGs. By extension, the goal is that this approach will benefit the economy, community, and environment of County Carlow²⁴.

²³- Carlow County Council is responsible for driving the following SDGs: Goal 6. Clean Water & Sanitation, Goal 7 Affordable & Clean Energy, Goal 11 Sustainable Cities & Communities, Goal 12 Responsible Consumption & production, Goal 13 Climate Action. Carlow County Council will however be responsible for promoting all the goals with a particular emphasis on goal 17 – partnership for the goals.

²⁴- The development strategy outlined here has been defined with reference to the SDGs and where actions align with SDGs this is indicated. This is intended to highlight the real opportunity for tourism to effectively contribute to the SDGs, rather than be a rigorous destination assessment exercise, for which a range of other tools are available.



**SUSTAINABLE
DEVELOPMENT
GOALS**



Go With The Flow River Adventures at Clashganny Weir

Sustainable tourism is tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities. Sustainable tourism should thus make optimal use of environmental resources, respect host communities and ensure viable, long-term economic operations, providing benefits that are distributed fairly among all stakeholders

Making Tourism More Sustainable - A Guide for Policy Makers, UNEP and UNWTO, 2005

4.2

Proposition and Vision

4.2.1 Proposition

The focus for the tourism strategy is to **match the distinctive offer of County Carlow**, as a destination with much to offer on Dublin's doorstep, with those visitors most likely to be attracted to the area and to which overseas marketing is targeted.

The purpose of the brand proposition, which is for internal use, is to guide future domestic and overseas promotion. **The proposition must align with the Ireland's Ancient East destination, focus on the natural built and cultural heritage of the county, and appeal to both domestic and overseas audiences.** The proposition for County Carlow is:

'A home of Irish heritage and culture - where visitors can discover the stories of Carlow people in spectacular houses and gardens, set amidst scenic mountains and picturesque rivers which provide the backdrop for a diverse range of outdoor activities and other historic and nature-based offerings. Experience Ireland's Ancient East on Dublin's Doorstep.'

4.2.2 Vision

The vision for County Carlow is to achieve a step change in the awareness of the county amongst domestic and overseas visitors, and to ensure opportunities identified to enhance the County Carlow offer are taken through effective public-private-community partnerships, while harnessing opportunities presented by the Ireland's Ancient East brand.

This vision underpins the objectives and actions for the county and is pragmatic, the goal is to increase visitor revenue and enhance job creation in Carlow, supporting a sustainable tourism economy based on built and cultural heritage and the natural environment, while ensuring that the resources upon which tourism is based are protected.

The vision for County Carlow as a visitor destination is that:

'Through implementation of this strategy County Carlow will be a welcoming and high-quality destination offering visitors a diverse range of experiences based on the county's heritage – an opportunity for visitors to discover historic big houses, spectacular gardens and unique spiritual/ecclesiastical and historic/cultural attractions, and to easily engage in outdoor recreation, set amidst the county's unspoilt environment, with choices to stay overnight in vibrant towns and villages.'

This will be achieved by raising visitor awareness of Carlow, through development of a flagship attraction and enhancing other key attractions, aligned with Ireland's Ancient East, and effective partnerships between public, private and community sectors, and with a focus on low-impact responsible tourism.

4.3

Pillars and Goals

To achieve this vision, five **pillars and associated goals** are defined, supported by a range of recommended initiatives. The pillars and goals include:

Pillar	Goal
Destination Management	To reinforce destination management structures to ensure a coordinated approach to tourism development, that supports the growth of the County Carlow tourism economy.
Visitor experience and product development including festivals and events	To identify opportunities for product enhancement and visitor experience development that align with the vision and themes of the Ireland's Ancient East brand and with visitor target market segments.
Capacity Development	To strengthen the capacity of industry to create and promote experiences that will attract priority segments from key markets.
Capacity Development	To identify internal and external collaborative opportunities between public, private and community sectors that maximise return on investment and that facilitate the development of enterprises and experiences around a shared vision and ambition.
Brand and Marketing Communications	To raise the profile of County Carlow as a high-quality visitor destination that leverages the Ireland's Ancient East brand and attracts more visitors matched to the county's tourism offer.

Table 4-1 Pillars and Goals



Vision

“Through implementation of this strategy County Carlow will be a welcoming and high-quality destination offering visitors a diverse range of experiences based on the county’s heritage – an opportunity for visitors to discover historic big houses, spectacular gardens and unique ecclesiastical attractions, and to easily engage in outdoor recreation, set amidst the county’s unspoilt environment, with choices to stay overnight in vibrant towns and villages.’

This will be achieved by raising visitor awareness of Carlow, through development of a flagship attraction aligned with Ireland’s Ancient East, and effective partnerships between public, private and community sectors, with a focus on low-impact responsible tourism.

Pillars

Pillar 1:

Destination Management

Pillar 2:

Visitor experience and product development including festivals and events

Pillar 3:

Capacity Development

Pillar 4:

Partnership Development

Pillar 5:

Brand and Marketing Communications

Figure 4-1:
Strategy Overview



Goals

Goal 1: To reinforce destination management structures to ensure a coordinated approach to tourism development, that supports the growth of the County Carlow tourism economy.

Goal 2: To identify opportunities for product enhancement and visitor experience development that align with the vision and themes of the Ireland’s Ancient East brand and with visitor target market segments.

Goal 3: To strengthen the capacity of industry to create and promote experiences that will attract priority segments from key markets.

Goal 4: To identify internal and external collaborative opportunities between public, private and community sectors that maximise return on investment and that facilitate the development of enterprises and experiences around a shared vision and ambition.

Goal 5: To raise the profile of County Carlow as a high-quality visitor destination that leverages the Ireland’s Ancient East brand and attracts more visitors matched to County Carlow’s tourism offer.

Actions

- Blackstairs Task Group
- Signage Audit and wayfinding
- Public transport network (Ring-a-Link)
- Access for all

- New science/industrial heritage museum
- Visitor Experience Plan for VISUAL
- Enhanced attractions, hubs, routes, trails
- A Journey Through Time
- Big Houses and Beautiful Gardens
- Valleys Views and Vales
- Inspired by Carlow

- Capacity building
- Market ready saleable experiences
- Bundled day and overnight itineraries
- Training supports
- Reduce tourism carbon footprint
- Local sourcing

- Intercounty initiatives and itineraries
- Tourism Ambassadors
- Strategic discussions

- Community surveys
- County Carlow Food and Drink Trail
- Relaunch County Carlow brand
- Budget Planning and Activity Plans
- International and domestic promotion
- Capitalising on Ireland’s Ancient East
- Collaborative marketing
- Digital marketing

4.4

Catalytic Projects

This section identifies those projects which are considered to have the potential to act as catalysts to drive tourism growth that prioritise revenue generation over volume growth, are capable of providing benefit to local communities and economies, which are aligned with the objectives of Ireland's Ancient East and the Sustainable Development Goals.

These are critical actions to ensure effective destination management, increase the visibility of the county, provide a competitive and high-quality tourism product and experiential offer, and drive awareness of the Carlow tourism offer. These include the following catalytic actions, which have also been shaded in green in the following action plan tables.

- Establish a Blackstairs Mountain Task Group (action 01.04) and support actions in the *Carlow Outdoor Recreation Strategy*;
- Implement a coherent and consistent signage and wayfinding strategy (action 01.05);
- Develop a feasibility study for a new flagship attraction in Carlow Town which links the industrial and scientific historic sites, ancestors and experiences throughout County Carlow. (action 02.01);
- Commission new feasibility study into, and seek funding for, the collaborative upgrade of the St. Mullins monastery site and Norman Motte as an integrated visitor experience in partnership with OPW and the local community (action 02.04);
- Develop a County Carlow Spiritual Highlights Tour (action 02.05), Carlow Castles' Trail linking key sites in the county (action 02.08) and a Carlow Emigrant Trail (02.25);
- Work with OPW to develop Altamont House and Gardens as a significant visitor experience for County Carlow (action 02.09);
- Identify the key strategic projects required to enhance the attractiveness of Duckett's Grove as a visitor attraction and seek funding to implement these projects (action 02.10);
- Work with Waterways Ireland to implement, update and revisit actions outlined in *The Barrow Corridor Recreational, Tourism and Commercial Product Identification Study* (action 02.12);
- Deliver a Fáilte Ireland Destination Towns Agenda for County Carlow including the implementation of the *Carlow Town Regeneration Vision and Implementation Strategy (RVIS)* (action 02.26);
- Support tourism providers and domestic and overseas tour operators to develop day tour or multi-day tour packages (action 03.03);
- Discuss, identify, and prioritise collaborative opportunities for clustered and joint experience development and promotion of tourism to include inter-county itineraries e.g. Ireland's Ancient East International Gateway Garden Festival (action 04.02);
- Raise awareness and promote – use of influencers, targeting large corporate companies, encouraging greater Carlow community and trade awareness of the Carlow tourism offer, targeting overseas students in IT Carlow and Carlow College, St. Patrick's, attending international trade and consumer fairs, promoting defined itineraries to target market associations (action 05.05);
- Communicate and collaborate – collaborative marketing initiatives under Ireland's Ancient East brand, engaging with Fáilte Ireland in development and implementation of VEDP's, hosting media visits and fam trips (action 05.06).

4.5

Recommendations

Rationale and recommendations for actions to support each pillar and associated goal are outlined in this section under each pillar heading, followed by specific action plans in section 4.6, identifying primary and support responsibilities, timeline for completing the action and key performance indicator, together with indicative budget and/or potential sources of funding. There are a range of existing funding measures which are outlined in Appendix 3.



Paddle Boarding with Pure Adventure

Pillar 1: Destination Management

Goal: To reinforce destination management structures to ensure a coordinated approach to tourism development that supports the growth of the County Carlow tourism economy.



Weavers Cottage, Clonegal, Co. Carlow

The business of managing, developing and promoting tourism in the county must be adequately resourced to ensure enough capacity to implement actions within this strategy and to capitalise on opportunities. The primary role of Carlow Tourism should be upon marketing of the County Carlow tourism product and experiences alongside member coordination, small scale infrastructure development in collaboration with Carlow County Council and other agencies, implementation of the festival programme, as well as related interaction with Fáilte Ireland, state agencies and neighbouring local authorities. Carlow County Council's role (through LEO) should be primarily upon identifying tourism experience development opportunities, including pursuing funding and strategic interaction; tourism related training and mentoring; and Carlow County Development Partnership's role should primarily be focused on pursuing funding, product development, promotion and community engagement. It is widely recognised that the TUS and RSS programmes make significant contributions to tourism community development and village enhancement, with both programmes being managed by CCDP. The role of the Carlow Local Community Development Committee (LCDC) should focus on the implementation of the tourism objectives of the *Local Development Strategy* (action 01.01).

There is significant power in collaborative marketing, and it is **important that Carlow Tourism is adequately resourced to enable marketing and promotional initiatives to be undertaken**, particularly those focused on the overseas markets.

The need for a Rural Recreation Officer role was highlighted during consultation and would be important to develop untapped resources, including loop walks and trails and the actions outlined for the Blackstairs and Barrow (01.02) in the context of the *Outdoor Recreation Strategy*.

Heritage sites provide visitors with a valuable sense of place. Many sites require protection as well as offering opportunities for growing tourism and in enabling County Carlow to link to Ireland's Ancient East themes. It is recommended that Carlow County Council **consider opportunities for economic benefit for tourism linked to developed heritage**

sites with visitor experience potential. This could be undertaken as part of the inCarlow - Economic Development Strategy 2021-2027 (action 01.03).

The Blackstairs Mountains present an opportunity for tourism and recreation development but must be managed carefully to minimise negative impacts upon the natural environment with the objective of a net positive impact. Given that the Blackstairs Mountains are located in both County Carlow and County Wexford and that a variety of different groups and interests are involved or should be involved in decision making it is recommended that a new group, similar in function to the Dublin Mountains Partnership, as a **Blackstairs Task Group** be established to implement actions recommended in this strategy (action 01.04). This would be envisaged as a sub-group of the over-arching Carlow Outdoor Recreation Partnership (CORP) proposed in the *Carlow Outdoor Recreation Strategy*.

Well positioned on the national rail, road and bus network, located less than an hour from Dublin and 75 minutes from Dublin Airport and with five neighbouring counties, County Carlow can harness this strategic location by improving the visibility of the county through more effective use of a **coherent hierarchy of signage**. This includes signage from the motorway and regional roads, and welcome signage at entry points to the county. Once visitors arrive in County Carlow it is important they feel welcome and that an integrated approach to wayfinding and public transport means they can find the information they require, understand what there is to see and do, and get to where they wish to visit. A wayfinding strategy that ensures consistency of directional and orientation signage within the county is important to ensure visitors are aware of the easiest way to travel around the county. Carlow County Council has recently been allocated funding of €500,000 by Fáilte Ireland under the Destination Towns programme. The project for Carlow Town focuses on the enhancement of public spaces within the town, development of a way finding project and welcome signage (action 01.05).

The consultation process highlighted the need for a bus **service to connect accommodation hubs** with visitor attractions in the county. It is recommended Carlow County Council, Fáilte Ireland and Carlow Tourism explore opportunities surrounding the existing

county Ring-A-Link services that provides for needs of the local community and visitors, linking visitor arrival points with settlements and attraction clusters using examples from elsewhere e.g. Offaly Explorer Experience, Hook Peninsula Summer Service. This would provide a sustainable transport option, an important option for many visitors, particularly those from overseas, who do not travel by car (action 01.06).

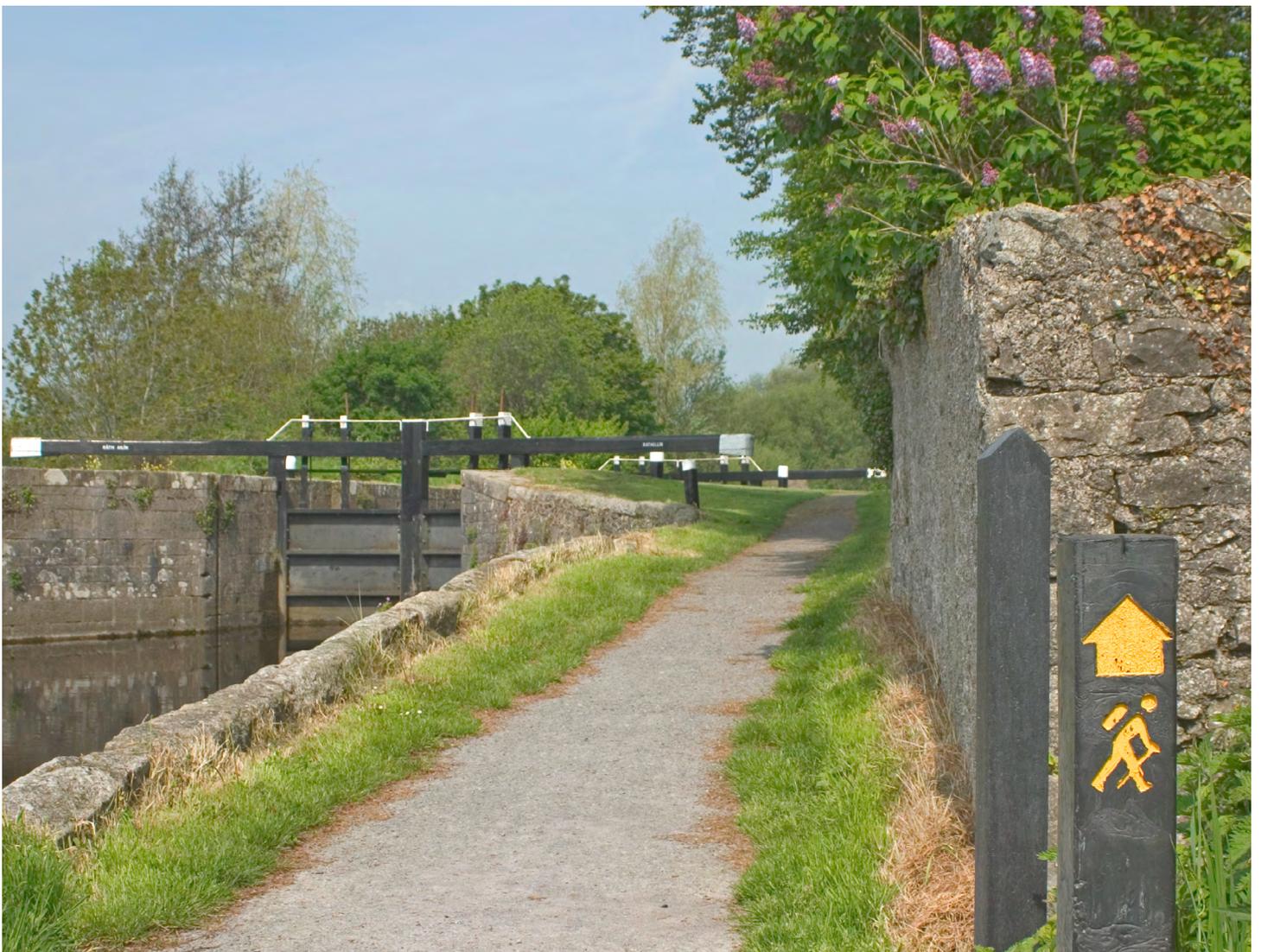
Tourism takes place in local communities and must be of benefit to those communities, and unless this is the case the rationale for promotion and development should be questioned. It is fundamentally important that the local communities of County Carlow are engaged in, and can have influence over, tourism decision-making for the county with effective communication, capacity building, training and representation (01.07).

It is becoming increasingly important to ensure that visitor facilities and attractions are accessible to the widest range of society possible, regardless of abilities, age or physical limitations. The subject of **accessible tourism** is gaining increasing international recognition and there are a range of best practice guidelines available at international level. Carlow Tourism and Carlow County Council can encourage and facilitate the provision of access to visitor accommodation, venues and activities and the availability of information on accessibility to those with varying levels of mobility and access issues (action 01.08).

To achieve the vision stated in this strategy it will be **important this strategy is resourced and implemented**. It is recommended that a monitoring committee be established to provide an overview and monitor of the strategic delivery of all key actions, meeting on a monthly basis to review progress and to make revised recommendations in respect of strategy delivery, as necessary. Additional partners to be invited to sit on this sub-committee as deemed appropriate (action 01.09).

Pillar 2: Visitor Experience and Product Development including Festivals and Events

Goal: To identify opportunities for product enhancement and visitor experience development that align with the vision and themes of the Ireland's Ancient East brand and with visitor target market segments.



Barrow Way, long distance walking route

The need for **enhancement of the tourism product** in County Carlow was a common theme during discussions with key stakeholders within the county and at regional and national level. The visitor experience and product development strategy focuses on **creating the right mix of tourism products appealing to visitor target markets** – that are the focus of Ireland’s Ancient East promotional campaigns and most likely to be drawn to an overnight stay in County Carlow.

The focus must be upon identifying a **compelling flagship attraction for the county that acts as a hook to raise visitor awareness, in tandem with visitor experience development that can activate a transformation in visitor awareness** of the county’s overall tourism offer, particularly amongst overseas visitors.

The north and the south of County Carlow have different characters; with much of the tourism product in the north, and the most scenic landscapes and waterways in the south. For the **south of the county the experience development focus must be upon fostering tourism that can contribute to economic development** and create opportunities for local employment halting population decline, while respecting the destination character. **For the north, emphasis must be upon high quality experiences that drive growth in visitor revenue and volume** and ensure visitors wish to return and recommend visits to others. Visitor experience and product development are described below under the themes and sub-themes outlined earlier, with projects that bring each of these to life.

Visitor Experience and Product Development Themes

Informed by the extensive community and trade engagement and on the ground destination analysis four themes for visitor experience and product development, as well as current and future marketing, are identified in figure 4-01. These play to the county’s strengths and offer the best opportunity to raise the profile of County Carlow, enhance visitor experience and benefit those living and working in the county. These themes, ‘A Journey Through Time’, ‘Big Houses and Beautiful Gardens’, ‘Valleys Views and Vales’ and ‘Inspired by Carlow’, provide a framework for enhancing the visitor experiences of the county and, importantly target those visitors most likely to be interested in an extended visit to the Ireland’s Ancient East destination, the ‘Culturally Curious’ and ‘Great Escapers’; as well as developing experiences identified as of interest to the domestic market (empty nesters/ pre-teen families), including big houses, gardens and walking. The goal is to match visitor experience investment to visitor target market needs. County Carlow offers a largely untapped opportunity to develop experiences for visitors to engage with the destination’s distinctive offer.

The four over-arching experience themes and supporting sub-themes seek to realise the wider destination vision that, *“Ireland’s Ancient East will be an immersive experience of living culture, breath-taking landscape and hidden history made remarkable by vibrant communities, local lore and the authentic character of the real Ireland”*²⁵.

Each of the four themes speak to elements of this vision, ensuring the focus of the development and marketing strategy is aligned with that of Ireland’s Ancient East. Themes and sub themes are also closely aligned with the outcome of community workshops and stakeholder engagement. Projects identified for investment must be credible and achievable, be matched with market need and enable development of saleable experiences that showcase Carlow as a visitor destination within Ireland’s Ancient East.

25 – Ireland’s Ancient East – A Path to Growth, Fáilte Ireland

MEGALITHIC,
ECCLESIASTICAL AND
NORMANS (BUILT
HERITAGE)



HOUSES & GARDENS



ACTIVITIES AND
PLACES (NATURAL
HERITAGE)



CULTURAL HERITAGE



A Journey Through Time

Early Settlers:

Brownhill Dolmen, Rathgall Hillfort, Ballon Hill, Carlow County Museum

Ecclesiastical Era:

St. Mullins, Columban Way, Clonmore Castle and Monastic Site (long-term), County Carlow Spiritual Highlights Tour, St. Laserians Cathedral, Adelaide Memorial Church, Carlow College St. Patricks, Carlow Cathedral

Norman Strongholds:

St. Mullins, Carlow Castle with river linkages, Carlow Castles Trail



Big Houses & Beautiful Gardens

Ireland's Big House Capital:

Altamont House and Gardens, Duckett's Grove, Huntington Castle, Borris House, Lisnavagh House, Carlow Big Houses Festival

Blooming Gardens:

Altamont Gardens and Walled Garden, Carlow Garden Festival, Duckett's Grove Walled Gardens, Arboretum Home and Garden Heaven, Leighlinbridge, Carlow Garden Trail



Valleys Views and Vales

Do it the Barrow Way:

The Barrow Corridor Recreational, Tourism and Commercial Product Identification Study (with actions updated and refined), watersports hubs, loop walks, Carlow Town Hub for the Barrow Way

Reach for the Sky:

Carlow Outdoor Recreation Strategy, Adventure Centre (mobile), walking hubs at Borris and Myshall, Columban Way, link Kildavin/Clonegal

Slaney Excursions:

Carlow Outdoor Recreation Strategy, Rathvilly River Trail, angling, kayaking

Room to Breathe:

Countryside towns and villages and walks, scenic drives, loop walks, cycling routes, urban realm, Blueway sites, Borris Viaduct



Inspired by Carlow

Rejoice and Revel:

Carlow Arts Festival, new Carlow Outdoor Adventure Festival, Big Houses Festival, International Achievers Summer School, Borris House Festival of Writing and Ideas, Pan Celtic Festival, Riverfest/Barrow Regatta, Emigrants Trail

Carlow Cultural Quarter:

Carlow Art Science attraction feasibility study, VISUAL, Carlow County Museum, Carlow College, St. Patrick's, Carlow Library, Carlow Cathedral, Carlow Tourist Office, urban realm



Figure 4-2:
Visitor Experience
and Product
Development Themes
and Sub-themes

Flagship attraction – Carlow Art Science Experience

As a key strategic intervention, it is recommended that a feasibility study for a new **flagship attraction** be considered in Carlow Town, which could be known as Carlow Art Science Experience²⁶ (action 02.01). This flagship attraction is envisaged to be an **innovative science/ industrial heritage museum**, and could:

- *function as a visitor hub and attractor for the county*, with enough scale to drive growth in overseas and domestic tourism, encourage them to stay for longer in the area and raise awareness of the wider County Carlow offer;
- *develop the reputation of Carlow as a home of innovation and industry*, with linkages to the third level innovation and industry education sector at IT Carlow;
- *provide an opportunity to discuss environmental issues and solutions*, capitalising on the county's connections to John Tyndall; and
- *provide an indoor attraction with an appeal to a range of audiences*, including families and the Culturally Curious.

This proposed flagship attraction, Carlow Art Science Experience, offers the greatest potential over the lifetime of the plan to grow year-round visitor numbers and raise the profile of the county as Carlow Town is the main accommodation and visitor service hub for the county. There are opportunities to link with Carlow County Museum, Carlow College St. Patrick's and Carlow Library in any plans or developments envisaged for the town centre in this regard.

Carlow Town is considered the optimum location for such an attraction given the range of visitor accommodation, facilities and services in the town. Consideration of such a flagship attraction would further build on existing public investment including recent funding by Fáilte Ireland under the Destination Towns initiative. In addition, the location of such an attraction should be considered in the context of the development of a Cultural Quarter in the town (discussed below under Theme 5), and of linkages with recreational opportunities, particularly along the River Barrow.

There are further opportunities to develop significant visitor attractions within the county, such as Altamont Gardens, Duckett's Grove, Brownhill Dolmen and St. Mullins. Over the course of the 5-year period of this strategy, development work can be envisaged that will enhance the visitor offer at each, positioning them for growth. However, issues of affordability and available funding in the current climate will need to be considered.



²⁶ Alternative suggestions include Carlow Cultural Centre, STEAM @ Carlow, Tyndall Centre @ Carlow, Carlow Science Museum and Art Gallery, Carlow Arts Science Gallery, Carlow ArtScience, Explore @ Carlow, Carlow Art Science Museum, Carlow Art Science Experience (CASE), John Tyndall Science Museum.

Theme 1: A Journey through Time

This theme seeks to build upon the wide range of historic heritage within County Carlow, addressing each within a chronological sub-theme. This ranges from those that provide evidence of the people first living in Carlow through the era when many religious buildings were constructed, to that when the Normans first settled in County Carlow.

- *Early Settlers* focuses on places with unique stories of survival and resilience. Recommendations include enhancing the **Brownshill Dolmen** site in partnership with the OPW and the landowner, including land acquisition to enable development of a larger carpark, enhanced trails and interpretation communicating the site's significance (action 02.02/03.02). If visitor numbers grow there may be an opportunity to enhance the visitor offer further through development of a visitor services building in conjunction with the OPW, however this should only be considered following monitoring of visitor numbers. Further recommendations include developing a **Bronze Age themed destination** for north Carlow and south Wicklow in collaboration with Wicklow County Council e.g. with a focus on inter-county trails development and medium-term experience and product development opportunities (action 02.03).
- *Ecclesiastical Era* includes sites, such as **St. Mullins**, that offer significant opportunities for development as compelling visitor experiences providing opportunities to discover more about the reasons why Carlow was an important religious centre (action 02.04). Recommendations include enhancing the visitor experience at St. Mullins through an inter-agency approach with the OPW willing to engage. An updated and clear strategic plan will help guide development in the coming years, in partnership with the local community and the OPW. St. Mullins offers the opportunity to develop a strategic visitor hub on the southern end of the River Barrow in County Carlow, with potential linkages to neighbouring counties. As discussed earlier spiritual tourism is thought to offer significant potential to attract overseas visitors with associated local economic benefit. Focus should be placed on key ecclesiastical sites, including **St. Laserian's Cathedral**, **St. Mullins**, and **Adelaide Memorial Church**, which would be



Tullow Museum

of greatest interest to visitors, with a **one-day 'County Carlow Spiritual Highlights' driving tour** using key sites in the Trails of the Saints driving route, and interpretation enhanced at these key sites (action 02.05). The strong connection between St. Willibrord, patron Saint of Luxembourg and first Apostle of the Netherlands, established by Carlow County Museum, provides considerable opportunity in terms of targeting visitors from Luxembourg, Germany, Belgium, and the Netherlands in the context of the Friendship Agreement signed between Carlow County Council and Ville d'Echternach. Further opportunities include development of **Clonmore Castle and the nearby monastic site** including improved visitor access and interpretation (action 02.06).

- **Norman Strongholds** continues the journey to those places where visitors can learn about why County Carlow was considered a strategic location for siting castles and forts to protect trade routes and settlements. A key aspect of

this theme must be on raising the bar in terms of access, with those sites of greatest potential for development as immersive experiences targeted for investment. **Carlow Castle** is a key site, although constrained by modern development. Recommendations include enhancement of the associated public realm, with linkages to a riverside walk along the Barrow (action 02.07). Carlow, as with many other counties in Ireland's Ancient East, has many castles. A new **Carlow Castles Trail** can link key sites (action 02.08). An action-based feasibility study for St. Mullins (as suggested above) could further consider the potential to progressively enhance the visitor experience at the Norman motte, an intriguing structure which can communicate the many layers of history at the site.

The sites identified under this theme have potential in turn to bring to life themes of Ireland's Ancient East, with links between 'Early Settlers' and the IAE 'Ancient Ireland' theme; and between 'Ecclesiastical Era' and the IAE 'Sacred Ireland' theme.

Theme 2: Big Houses and Beautiful Gardens

This theme covers those places that resonate strongly with the target market for Ireland's Ancient East, the Culturally Curious visitor, and with the domestic audience.

- ***Ireland's Big House Capital*** is an important theme given County Carlow can lay claim to be the most gentrified county in Ireland with 60 big houses, 40 of which are still occupied. The importance of big houses to visitors is recognised with the Tale of Two Worlds theme as part of the Ireland's Ancient East offer. County Carlow is fortunate in having two key sites, **Altamont Gardens** (action 02.09) and **Duckett's Grove** (action 02.10) in public ownership. There are significant opportunities to enhance both as compelling and immersive visitor attractions of great interest to visitors.
- ***Blooming Gardens*** is much broader covering garden centres, urban and rural gardens and whole villages such as Leighlinbridge. It will be important to ensure visitors are aware of the wider offer around both houses and gardens and to ensure they can engage in immersive saleable experiences at key locations. Many big houses also have beautiful gardens and those in Carlow are no exception, including Altamont Gardens and Huntington Castle. Raising awareness of the big houses in County Carlow is key, and the **Carlow Big Houses Festival** is an ideal mechanism for this purpose and should be developed further, with potential to link places taking part in the festival with a pilot bus tour in consultation with Ring A Link (action 02.11).



Altamont Gardens

Theme 3: Valleys Views and Vales

This visitor experience development theme seeks to capitalise on the beautiful natural environment of County Carlow, and to create opportunities for visitors to purchase more saleable experiences based on that environment. The focus is on the mountains, rivers and beautiful towns and villages of the county.

- *Do It the Barrow Way* focuses on enhancing ways in which visitors can engage with the river corridor as a spine for tourism development, both on and off water, through a collaborative plan-based approach by revising, updating and implementing actions within *The Barrow Corridor Recreational, Tourism and Commercial Product Identification Study* commissioned by Waterways Ireland and the *Outdoor Recreation Strategy* recently completed by Carlow County Council. This includes development of **water sports hubs (including Carlow Town Park)**, developing linkages across the river and between the river and river-side settlements, a focus on **industrial heritage** along the river as a cluster of blue/green experiences, trailheads at strategic locations along the river in Carlow, development of Carlow Town as a walking hub for the Barrow Way, provision of visitor infrastructure such as facilities (shower and toilet facilities) similar to those at Clashganny, and enlivening and enhancing the towpath with horticultural, artistic and cultural experiences via sculpture and other medium experience e.g. Tyndall route from Leighlinbridge to Ballinabranagh via murals, bank side sculpture and infrastructure. The objective is to make the River Barrow a 'must-see' experience (action 02.12). The Barrow River can be linked to the Blackstairs Mountains and attractions along the course of the river through existing and new walking routes and experiential offers, and to towns such as Borris (action 02.13).



- *Reach for the Sky* alludes to the opportunity to drive local economic development through showcasing the beautiful views, living culture and rich heritage of the Blackstairs. This thematic experience area focuses on enhancing the walking and cycling offer, in tandem with enabling visitors to discover the area's history encouraging overnight stays and by extension economic opportunity. Key projects include a feasibility study with community buy-in for a new **adventure centre** facility with multiple uses (for which towns could bid for) (action 02.14); considering a 3km link between the South Leinster Way at Kildavin and Wicklow Way at Clonegal; enhancing **off-road links between Borris and the Blackstairs**, and development and promotion of a '**Columban Way**' walking trail Camino route (action 02.15). Acknowledging the important work undertaken by the Blackstairs Farming Group, there must be consultation with this group with regards to outdoor recreation development (action 2.16).
- *Slaney Excursions* focuses on the often-overlooked River Slaney, and opportunities to extend visitor dwell time through development of the recreational offer, linking settlements and attractions along the river. The small towns and villages of County Carlow offer visitors the opportunity to interact with local people, and for local people to harness economic opportunities offered by tourism growth. Key projects include enhanced **riverside linkages and river-based activities at Tullow, and development of a 'Rathvilly River Trail'** (action 02.17).
- *Room to Breathe* alludes not only to County Carlow's towns and villages, but also **sustainable communities, localism and space for authentic interaction**. This sub-theme concentrates on ways to enhance the local offer, linking settlements and attractions to create experience clusters, to **provide local economic benefit** by extending visitor dwell time and in so doing providing much needed recreational facilities for rural communities, making **better places for people to live in and to visit**. Recommendations include enhancing the walking offer, through projects such as exploring the feasibility of a walk/cycle trail between St. Mullins and New Ross, **positioning Borris** (by implementing measures as outlined in the '*Borris Our Vision*' study) **and Myshall as walking hubs**, and **Carlow Town as a hub for the River Barrow and Barrow Way long distance walking route**, identifying opportunities to link towns and villages to longer walking routes e.g. Tullow to the Wicklow Way via Rathgall, maximising the opportunity presented by the Borris Viaduct, and reviewing the Clashganny water recreation facility model (action 02.18). There is potential to link all cycle routes to the new Carlow Outdoors website developed by CCDP. It is recommended that projects that have been completed by Carlow County Council in collaboration with Carlow Sports Partnership (Carlow Heartlands = Bagenalstown - Drumphua 60kms, Hidden Sky Road = Borris - Myshall – Garryhill 37kms) and that are currently being pursued, subject to funding (Rathvilly - Clonmore 29kms, Tullow - Clonegal 39 Kms, Carlow Loop 68kms) be included in promotion of the County Carlow cycling offer. Further opportunities however lie primarily in the development of off-road Greenways and the linkages which County Carlow can encourage with those facilities currently being developed north and south of the county. Examples include Tullow, Bagenalstown. (action 02.19).

Towns and villages are key to the success of tourism development for County Carlow, as these are the places where visitors can meet local people, stay overnight and spend money on food, drink and services. Investment is essential, for residents and by extension for visitors again making better places for people to live in and to visit. Key places and projects (action 02.20) include:

“Carlow County Council in the context of the Carlow Outdoor Recreation Strategy have developed a range of actions related to outdoor recreation ”

- **Carlow** - implementation of measures identified as part of the *Carlow Town Regeneration Vision and Implementation Strategy (RVIS)* and the development of the Cultural Quarter;
- **Bagenalstown/Muine Bheag** – linkages with the River Barrow, developing a critical mass of tourism facilities, signage and visitor infrastructure, public realm enhancements in the town core and other measures as outlined in the *Bagenalstown Local Area Plan 2017-2023*;
- **Tullow** – linkages with the River Slaney, developing a critical mass of tourism facilities, physical public realm interventions such as signage and paving, market or local outlet for food and craft;
- **Borris** – implement measures outlined in the *Borris – Our Vision* document including enhancing the public realm.

Carlow County Council in the context of the **Carlow Outdoor Recreation Strategy** have developed a range of actions related to outdoor recreation (action 02.21). These include measures related to cycling and walking, outdoor recreation programmes, outdoor recreation in urban environments, and **development of existing standalone Blueway sites** (action 02.22). All these actions, when implemented by the Carlow Outdoor recreation Partnership (CORP), will improve the recreational offer and will be of value in enhancing the tourism offer of County Carlow.

Theme 4: Inspired by Carlow

This theme represents visitor experience development opportunities motivated by and celebrating the people and places of County Carlow.



The Carlow Garden Festival

- ***Rejoice and Revel*** focuses on events and festivals that showcase aspects of the county's tourism offer including culture and creativity, big houses, gardens, adventure, golf and special interest activities, as well as a means to celebrate famous members of the Carlow diaspora. Opportunities for new events that encourage overnight visits based around the cultural offer of the county will be critically important. Recommendations include continued investment in existing flagship festivals (action 02.23) such as the **Carlow Arts Festival, Carlow Garden Festival, Borris House Festival of Writing and Ideas and Pan Celtic Festival**. It is recommended that Carlow County Council and Carlow Tourism consider developing new events (also action 02.23), such as a Carlow Outdoor Adventure Festival, in the context of the *Carlow Outdoor Recreation Strategy*; to consider Ballon's concept of climate change/eco/green festival to a county-wide event; to support private sector to develop a Carlow Adventure event similar in scale to Reeks 5, that drives off/shoulder season visitors and that includes accommodation and travel packages; to develop a **Carlow International Achievers Summer School linked to Carlow College, St. Patrick's, a Carlow Big Houses Festival, and Riverfest/Barrow Regatta**. It is recommended that the existing commercial viability of festivals and events be reviewed as part of a new *Carlow Festivals and Events Strategy* (action 02.24). It is recommended that Carlow Tourism and Carlow County Museum consider an **Emigrant Trail** as described in the *County Carlow Twinning and Diaspora Strategy* to celebrate the county's diaspora and fulfil twinning and diaspora objectives (action 02.25).

Theme 5: Cultural Quarter

This theme represents visitor experience development opportunities motivated by and celebrating the people and places of County Carlow.



Black Castle, Leighlinbridge

- **Carlow Cultural Quarter** seeks to reinforce the concept of a **cultural quarter in Carlow Town as a cluster of culture-based visitor experiences**. The Carlow Cultural Quarter would include VISUAL, Carlow College, St. Patrick's, Carlow County Museum, Carlow Cathedral, Carlow Library and Carlow Tourist Office. Recommendations include delivery of a Fáilte Ireland Destination Towns Agenda for County Carlow including the implementation of the *Carlow Town Regeneration Vision and Implementation Strategy (RVIS)* with particular focus on the tourism potential of the Cultural Quarter, River Barrow, traditional town centre, Carlow Castle, public activity spaces and other cultural and heritage assets (action 02.26).

Touring trails

- Touring Trails are well defined in County Carlow and have a **strong role to play in linking places**, attractions and activities. Relevant trails are considered under each theme above with a focus on ensuring trail development, that adds value to the visitor experience and stimulates economic growth. Recommendations for innovative **new or refined touring trails** (rather than walking, cycling or river-based trails) include:
 - County Carlow Spiritual Highlights Tour (02.05, *Ecclesiastical Era*);
 - Carlow Castles Trail (02.08, *Norman Strongholds*);
 - Carlow Emigrant Trail (02.25, *Rejoice and Revel*).

Pillar 3: Capacity Development

Goal: To strengthen the capacity of industry to create and promote experiences that will attract priority segments from key markets

Over 270,000 people were employed in the tourism industry in Ireland pre-Covid-19. Growth and **development of the tourism industry provides an opportunity to create and develop employment opportunities/alternative livelihoods for Carlow residents** through capacity building and local recruitment (action 03.01).

Borris House, Huntington Castle and Lisnavagh House offer a fascinating insight into the history of the county. Support can be given to build the capacity of sites such as these that can contribute to the tourism offer of the county and offer local opportunities for economic growth (action 03.02).

Input from the consultations indicated that some operators are seeing more and more requests for experiences, e.g. meeting locals, local food tastings, crafts, unique experiences like whiskey and cheese pairing, hands-on like action, like making scones/ bread. It is recommended that Carlow Tourism support tourism providers, as well as domestic and overseas tour operators to **develop day tour packages and multi-day tour saleable itineraries, aligned with Ireland's Ancient East**, which include an experiential aspect which match the motivators

“The focus should be on encouraging and facilitating Carlow tourism trade to take the lead on developing such packages and to focus on those most likely to appeal to target markets and that align with the vision for tourism development in County Carlow”

of the market segments working with Fáilte Ireland. Suggested focus should be on Great Houses and Gardens, Distillery and Food, and Heritage as these themes appeal across many market areas and many tour operators within each of these markets. The key market areas would be North America, France, Germany, Italy and Great Britain.

Day tour itineraries could include:

- Carlow Town – walking tour of the town coupled with the experience of visiting attractions including Carlow County Museum, VISUAL and Delta Sensory Gardens, and lunch and return to Dublin;
- Carlow Town – arrival into Carlow transfer to South of the County to enjoy a day of soft adventure along the Barrow, starting at Borris or St. Mullins;
- Soft Adventure – arrival into Carlow Town, transfer to Borris, engage in either walking on the Barrow or South Leinster Way, picnic lunch and return early evening to Dublin;
- Blooming Gardens and Big Houses of Carlow Tour – various itineraries featuring garden and houses attractions.

Overnight itineraries would combine the day tour packages as outlined above with accommodation and evening entertainment in accommodation hubs. Examples of such packages include:

- Delta Sensory Gardens tour followed by George Bernard Shaw theatre production and Carlow Town accommodation;
- Altamont Gardens tour with lectures and courses at Altamont Plant Sales;
- Walking tour in the Blackstairs followed by music and accommodation in Borris;
- Experience the Spiritual Highlights Tour while staying overnight in the county.
- Arboretum garden day tours with overnight accommodation at the Lord Bagenal Inn – e.g. Carlow Gardens Experience Day Tour;
- Borris House tour and lace-making course and accommodation at Step House Hotel.

The focus should be on encouraging and facilitating Carlow tourism trade to take the lead on developing such packages and to focus on those most likely to appeal to target markets and that align with the vision for tourism development in County Carlow. Once saleable itineraries are developed it is recommended that Carlow Tourism work to **facilitate and encourage engagement between key industry members and ITOA and Meitheal partners e.g. Abbey Tours**, to engage and drive international visitors. It is further recommended that Carlow County Council and Carlow Tourism, in partnership with both Fáilte Ireland and Tourism Ireland, work together to **facilitate fam/education workshops for ITOA members** to experience the international market ready visitor attractions in County Carlow (action 03.03).

There is a strong and growing visitor interest in Ireland's food and drink offer, reflected by national focus through Taste the Island and, with a developing local offer. It is recommended that tourism providers

are supported to **develop bundled offers that include food, drink, accommodation and activity product throughout the county.** It is important that the quality of this employment is high and that this is fostered through increased capacity building. Tourism businesses including hotels and attractions have a part to play, for example **sourcing local produce in cafes and restaurants** to increase local revenue from tourism (action 03.04).

To ensure the tourism trade in County Carlow have adequate capacity and are positioned to foster growth in tourism it is recommended that an **overview of training opportunities are provided on the Carlow Tourism website**, such as those offered by Fáilte Ireland and Carlow LEO. It is further recommended that **strong training-related supports are provided for Carlow Tourism members** to include an assessment of training needs and a programme of supports to address those needs. (03.05).

Tourism related enterprises should be encouraged to **reduce their impact upon the environment by reducing their energy demand, increasing recycling and utilising best practice procurement policy where possible.** Carlow Tourism and Carlow County Council have a role to play including supporting and disseminating best practice information (action 03.06).

Pillar 4: Partnership Development

Goal: To identify internal and external collaborative opportunities between public, private and community sectors that maximise return on investment and that facilitate the development of enterprises and experiences around a shared vision and ambition.

It is well understood that visitors do not recognise county borders. County Carlow has strong cultural and functional links to neighbouring counties and connecting to the wider Ireland's Ancient East experience. **Collaborative development and promotion of tourism at a regional level** enables economies of scale and a strategic approach. Recommendations include:

- **Enhancing inter-county linkages** through consideration of a pedestrian/cycle bridge between County Carlow and County Kilkenny across the River Barrow at St. Mullins with a looped walk along the Wexford stretch of the river to return to St. Mullins, and a Greenway to Palace East and New Ross via the former rail network from Bagenalstown (action 04.01);
- **Collaborative opportunities for clustered and joint experience development and promotion** of tourism to include inter-county itineraries and developing existing relationships established as part of SE Action Plan for Jobs to promote the SE region e.g. International Gateway Garden Festival (action 04.02);
- **Encouraging greater buy-in** by the business community and the local resident community to tourism promotion, helping to generate a sense of pride and ownership in the tourism potential of the county. It is recommended that this be undertaken through a Carlow Tourism Ambassador/Champion programme, modelled on that utilised for The Gathering in 2013 for which a Volunteer Ambassador Toolkit was developed (action 04.03).

It is recognised that Carlow Tourism regularly engage with agencies such as OPW and Waterways Ireland on specific projects. It is recommended that strategic discussions be held with key members of state agencies to discuss timelines and collaborative opportunities in relation to tourism product and experience development (action 04.04). For example, this would include the following agencies and projects:

- OPW: Conservation Management Plan for Altamont House and Gardens, St. Mullins Strategic Development Plan;
- Waterways Ireland: Implementation of *The Barrow Corridor Recreational, Tourism and Commercial Product Identification Study*;
- Coillte: development of forest-based trails and recreational infrastructure;
- Ireland's Uplands Council.

Pillar 5: Brand and Marketing Communications

Goal: To raise the profile of County Carlow as a high-quality visitor destination that leverages the Ireland's Ancient East brand and attracts more visitors matched to the county's tourism offer.

Strategic Marketing Approach

In marketing terms, the Carlow Tourism brand holds significant untapped potential to enhance visitor numbers, spend, yield and seasonality impacts. The County of Carlow is relatively undiscovered and unknown from an international perspective, whether for heritage, culture, garden, food or adventure tourism. Although important strides have been made in developing special-interest trails, festival and events, and other key initiatives, **there are opportunities to achieve greater impact from international and domestic tourism, to dispersing visitors throughout the county, increasing dwell time and encouraging overnight stays.** These include investment in product and experience development, and in the development of innovative trails such as a Carlow Spiritual Highlights Trail, Carlow Castles Tour, and initiatives such as 'Spend a Day in Carlow.' These tap into the objectives of Ireland's Ancient East, enabling leverage of international marketing investment.

As a less discovered gem of Ireland's Ancient East, Carlow Tourism is well poised to reap the rewards of a greater strategic, operational and financial focus on enhancing impact and loyalty from domestic tourism and building the county profile for international visitors to the region. The objective of the marketing strategy is to **highlight actions which, with limited investment, can unlock the significant benefits that an increase in tourism activity can mean for the county.**

County Carlow is part of Ireland's Ancient East and development proposals and marketing strategy must align and work with the overarching destination brand to enable effective leverage of marketing and business supports. To effectively market internationally and domestically, Carlow Tourism must ensure the market readiness of its portfolio of products and segmented themed experiences and build close alignment with the global branding of Ireland's Ancient East. A streamlining of strategic and operational focus would ensure the marketing of the County is well adapted to the current and emerging trends in consumer and trade tourism development.

Objectives

It is important that the marketing approach has clear objectives that enable a strong and consistent message to be disseminated, and to enable the best use of resources. The marketing objectives are consistent with the proposition outlined earlier in section 4.2.1. In order to increase visibility and get the best return on the investment to be undertaken, County Carlow must:

- **communicate a clear, strong message about the county**, its attractiveness for tourism and promote newly developed tourism facilities that dovetail with the themes of Ireland's Ancient East;
- **establish effective PR and communication channels** to enhance the county's visibility and reputation amongst domestic and international visitors;
- **continue to support and develop a regular programme of events** appealing to visitors, to sustain interest in the county;
- **engage with tour operators**, the press and the wider tourism industry and attract domestic and international visitors to the county;
- **coordinate** with neighbouring counties, the Regional Assembly, state agencies with a tourism focus and national tourism authorities.

Many destination management organisations have introduced surveys of resident communities to determine attitudes to tourism development, to ensure that issues and opportunities can be addressed and prioritised. It is recommended that Carlow Tourism **introduce an online community tourism survey every two-years** through the Public Participation Network in this regard. Measuring bednights and volume to visitor attractions does not however enable the economic benefit to the county to be measured; a more important measure than volume growth as the emphasis of the strategy is upon increasing yield per visitor. Given that changes over the 5-year period of the strategy are unlikely to impact on the current less than 0.5% share that County Carlow has of the national overseas visitor revenue figure, it is recommended that a *bi-annual visitor survey* be introduced to gauge visitor's motivation, interests, satisfaction and spend. (action 05.01).

To increase business for the accommodation and attractions sector in County Carlow, Carlow Tourism providers need to **engage and work with distribution channels** which have the potential to deliver and grow international visitors from key markets. As the product offering stands in terms of accommodation, visitor attractions, touring potential and soft adventure, food and drink, Garden Trail and Great Houses, Carlow is market ready for international visitors in some respects. However, to grow visitor numbers over the next five years, Carlow will need to invest in **enhancing and developing new visitor experiences, and an iconic attraction**.

Carlow should focus on the market segmentation of **'Culturally Curious'** and **'Great Escapers'** for soft adventure. Marketing campaigns and promotions and collaboration with ITOA members and overseas operators should focus on driving FIT's and ad hoc and series groups as the county's tourism product offering and accommodation matches with the needs of these buyers. This could also be expanded to targeting small – medium sized incentive groups, with a strong focus on the experiential aspect to include soft adventure activities.

Irish and Northern Irish visitors account for over 56% of overall tourism numbers in Ireland and 32% of visitor revenue. The County of Carlow is highly dependent on the domestic market with over 82% of visitors to the Ireland's Ancient East region from within Ireland. Many of these visitors are also day visitors with a strong focus on visiting gardens, walking, and attending festivals and events within the county, however the key objective is to increase length of stay and overnight stays. Domestic visitors are an important market; contributing off-peak and shoulder visits as well as word of mouth recommendations. To grow domestic tourism Carlow Tourism needs to consolidate and build on current successful marketing initiatives.

Research undertaken for this strategy indicated there was a lack of resonance in the market with the current Carlow Tourism brand 'Through the Waters of Time'. Fáilte Ireland launched a €6m home holidays marketing campaign in 2020 targeting the domestic and Northern Ireland visitors called

'Keep Discovering', and promotional efforts to build awareness and generate interest through compelling and consistent communication to domestic consumers and trade segments is a priority. This can be managed by a mix of paid, earned, and organic media, where earned media through public relations and media outreach is greatly enhanced. It is recommended the **Carlow Tourism brand be relaunched in the domestic market with a brand that captures the Carlow offer** (action 05.02).

To drive group/coach business in volume and to stay over, one iconic visitor attraction is needed with flexible opening hours, and a good lunch option. To

achieve success any "experiential" activity needs to take language into consideration, as the 'culturally curious' in Europe will struggle with language which could impact on the engagement with locals. A re-launch of a County Carlow Food and Drink Trail is recommended, following establishment and capacity building for a **County Carlow food network** (action 05.03).

It is recommended that **budget planning and activity plans** are agreed annually for the following three-year period. This enables Carlow Tourism to proactively plan and initiate marketing and promotional actions (action 05.04).



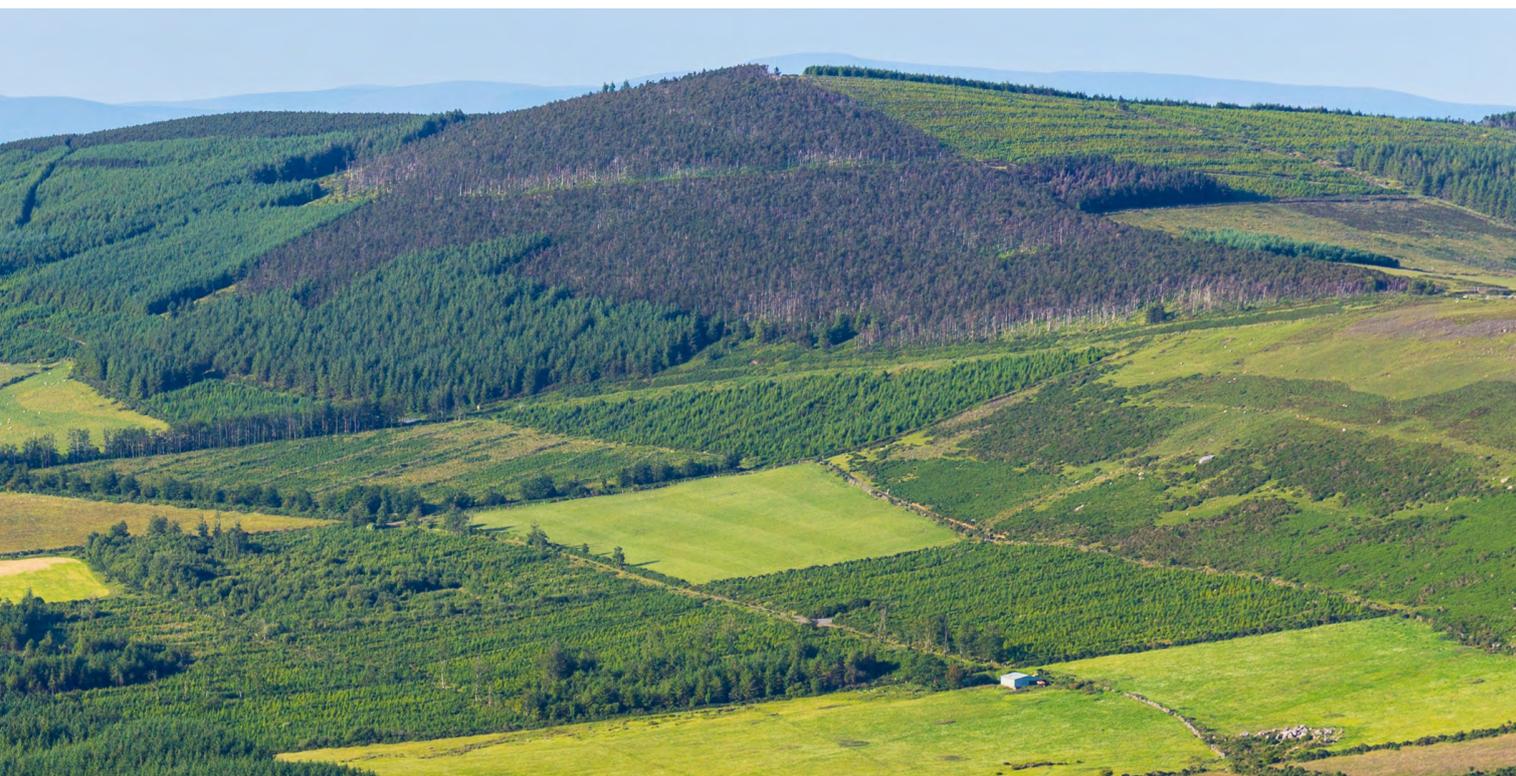
Aerial view of Carlow Town

Key Recommendations for Raising Awareness and Promotion (action 05.05)



There are a range of measures which are essential for County Carlow to prioritise to raise awareness in both international and domestic markets. It is recommended these include:

- **Driving awareness of the Carlow offer through use of online social media and digital influencers.** To create awareness of the county offer Carlow Tourism should drive interest through Instagram, as well as engaging digital influencers to drive and ensure the experiential message of what the county has to offer. To grow business from the “special interest” groups sector, it should be planned over a period to invite potential influencers of golf societies, walking groups, kayaking groups to come and experience first-hand so they can act as influencers and bring actual business to the county
- **Targeting corporate companies in Dublin with younger demographic employees for weekend activities and entertainment.** These companies have employees with significant disposable income seeking weekend and holiday entertainment and are only an hour from Carlow
- **Encouraging greater Carlow local community awareness of the Carlow tourism offer through open days and promotion** e.g. ‘Spend a day in Carlow’, ‘Come and Try It’, encouraging use of local walks. Local people can help sell the offer but can do this more effectively with a greater awareness of what there is to see and do in the county
- **Encouraging greater tourism trade awareness of the Carlow tourism offer through familiarisation events.** To foster greater co-competition between Carlow tourism members, it is recommended the current initiatives in relation to in-county familiarisation events be continued and expanded using best practice initiatives from other destinations such as the Burren Geopark
- **Targeting overseas students and their families at IT Carlow, developing packages that would appeal and encourage out of season engagement.** The recent growth in the IT industry in Dublin brings an opportunity to target



high-earning young employees in the technology sector for weekend activities and entertainment. There is also an opportunity to target overseas students and their families at IT Carlow and other 3rd level colleges in the county, developing packages that would appeal and encourage out of season engagement. These students spend c.€4.7m annually excluding fees and are mostly interested in activities from October to March

- **Attending national and international consumer fairs with a focus on increasing international visitors to County Carlow including World Travel Market in London, ITB in Berlin and Meitheal.** Attending international trade fairs is considered essential to enable the tourism sector in Carlow to heighten its proactivity in the international market area. For example, this includes registering to attend Meitheal from 2021 onwards, thereby profiling the destination at an event at which Fáilte Ireland brings over 400 global tour operators who programme Ireland. Carlow need to ensure they become part of the

pre-and post familiarisation trips which happen under the umbrella of Ireland's Ancient East. It would also be important that Carlow Tourism attend other international platforms, e.g. World Travel Market in London, ITB Berlin, Jump into Ireland shows in the USA market, along with Flavours of Ireland in the UK. Collaboration in this regard between several counties within the South East would bring more profile to the whole region

- **Define and promote saleable itineraries which include an experiential aspect which match the motivators of the market segments working with Fáilte Ireland and align with Ireland's Ancient East.**

Key Recommendations for Communication and Collaboration (action 05.06)

- **Collaborative marketing initiatives under the Ireland's Ancient East brand are prioritised.** In its five-year plan for the development of Ireland's Ancient East, Fáilte Ireland indicates that its goal is *"to make the region the most personally engaging cultural destination in Europe. This will be achieved by harnessing the authentic character of the real Ireland, its living culture, lush landscapes and hidden history, opening it up for everyone"*²⁷. Measures include participation in the 'Tales of Two Worlds' Visitor Experience Development Plan, Great Houses and Gardens Experience Development Programme and other initiatives developed under the brand such as the International Gateway Garden Festival at planning stage.
- **Spreading visitors throughout the South East and Ireland Ancient East region** – Carlow Tourism must continue to work collaboratively to encourage the dispersion of visitors within the region. Since Fáilte Ireland's, 'Ireland's Ancient East' marketing initiative was launched over four years ago, it is performing well and now businesses in Ireland's Ancient East are also beginning to experience similar success to counterparts on the Wild Atlantic Way. With the north and south of County Carlow located near Wicklow/Kilkenny/Waterford/Wexford/Laois/Kildare, this may present an opportunity for accommodation overflow during large events. This might also help in attracting and bidding for similar key events like the National Ploughing Championships.

Digital Marketing Budget

- The objective will be to build to a €30,000 budget for digital and social media marketing over the period of the strategy.
- It would be important that metrics of success focus on metrics that can be accurately measured and bednights and visitor attraction numbers are two key metrics. For both, it is important that **more businesses are encouraged to make returns to Fáilte Ireland over the lifetime of the strategy.** It is also important to **grow the number of attractions in Carlow to provide a wider product base.**

27- Ireland's Ancient East, Path to Growth, Fáilte Ireland



Browns Hill Dolmen

4.6 Action Plan

Pillar 1:

Destination Management

Goal: To reinforce destination management structures to ensure a coordinated approach to tourism development, that supports the growth of the County Carlow tourism economy.

	Action	Lead Agency	
01.01	Work to agreed and pre-defined tourism development and promotional roles and responsibilities for all tourism stakeholders at county level including Carlow County Council, Carlow Tourism and the tourism sector, Fáilte Ireland, Carlow LCDC, Carlow County Development Partnership and County Carlow Chamber of Commerce to respond to the strategic goals arising from this strategy. Identify collaborative structures where required to deliver on goals.	Carlow County Council Carlow Tourism Fáilte Ireland Carlow LCDC Carlow County Development Partnership County Carlow Chamber of Commerce	
01.02	Source funding for new County Carlow Rural Recreation Officer role.	Carlow County Development Partnership (CCDP)	
01.03	As part of the in <i>Carlow - Economic Development Strategy 2021-2027</i> ascertain the opportunities for economic benefit for tourism linked to developed heritage sites which have visitor experience potential.	Carlow County Council	
01.04	Consider development of a Blackstairs Task Group, as part of a Carlow Outdoor Recreation Partnership, to implement actions outlined in the <i>Carlow Outdoor Recreation Strategy</i> .	Carlow Outdoor Recreation Partnership (CORP) - structure for delivery to emerge from within this group.	
01.05	Undertake a tourism signage audit focusing on I. Motorway signage for key attractions II. Welcome signage at all county boundary points III. Directional signage within the county IV. Wayfinding signage in Carlow Town V. Review and maintain orientation signage at key visitor arrival points Seek funding for the implementation of a coherent and consistent signage strategy arising from the audit, and consistent in some form with the approaches taken by neighbouring counties. Complete using best practise examples from other Fáilte Ireland projects and interpretative toolkits.	Carlow County Council	

Partners	Timescale	Key Performance Indicator	Indicative Budget/ Potential Sources of funding € - annual	SDG Linkages
	2020-2021	Carlow County Council, Carlow Tourism and the tourism sector, Fáilte Ireland, Carlow LCDC, Carlow County Development Partnership and County Carlow Chamber of Commerce work to pre-defined roles.		
Carlow Outdoor Recreation Partnership (CORP)	2021	County Carlow Rural Recreation Officer post established.		
Fáilte Ireland Carlow Tourism Carlow County Museum CHAS Cultural Venues Heritage Council	2020-2021	County Carlow heritage sites reviewed as part of the inCarlow Economic Development Strategy 2021-2027.		 
	2021-2023	Blackstairs Task Group formed.		     
Carlow Tourism TII NTA Fáilte Ireland Waterways Ireland Coillte OPW	2020-2023	Signage audit completed and implemented.	€20,000	 

	Action	Lead Agency	
01.06	Explore the opportunities surrounding the existing county Ring-A-Link services that provides for the needs of the local community and visitors, linking visitor arrival points with settlements and attraction clusters using examples and research from elsewhere e.g. Offaly Explorer Experience, Hook Peninsula Summer Service.	Carlow County Council	
01.07	Strengthen and promote sustainable community inputs to the development of tourism at county level by: <ul style="list-style-type: none"> I. Facilitating an effective communication plan that enables and encourages active participation by all individuals and community groups with a vested interest to engage meaningfully in tourism in order to ensure tourism readiness. II. Develop be-spoke training plans and mentoring supports for communities to fully identify and maximise the impact of tourism in their host community by focusing on key assets and potential visitor experiences. III. Encourage and train communities to offer a complete tourism experience for visitors by identifying gaps through a cohesive approach based on models like the Smart Villages concept in Scotland. IV. Through linkage with appropriate funding schemes and other training and education providers, explore and develop bespoke training programmes which actively encourage greater knowledge and participation in tourism by the broader community to increase the county's tourism offering. V. Facilitate enhanced community representation on the Board of Carlow Tourism. 	Carlow County Development Partnership	
01.08	Encourage and facilitate the provision of access for all for visitor accommodation, venues and activities and the availability of information on accessibility.	Carlow County Council	
01.09	Establish a monitoring and evaluation sub-committee to overview and monitor the strategic delivery of all key actions, meeting on a monthly basis to review progress and to make revised recommendations in respect of strategy delivery as necessary. Additional partners to be invited to sit on this sub-committee as deemed appropriate.	Carlow County Council/ Carlow Tourism	

	Partners	Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
	Ring-A-Link Carlow Tourism NTA Visitor attractions Hotel and accommodation providers Fáilte Ireland	2020-2025	Potential opportunities to connect public transport network established, linking hubs and experiences.		  
	Carlow County Council (community section) Carlow PPN Community groups countywide Carlow Tourism Fáilte Ireland KCETB Carlow IT Private training providers Carlow LCDC	2020-2025	Greater involvement in community-based tourism. Increase in saleable offerings. Participation in decision making for community representatives on the Board of Carlow Tourism.	€5,000 - €10,000	  
	Carlow Tourism Tourism trade County Carlow Chamber of Commerce PPN Disability organisations including Cairdeas, BEAM, IWA, Delta Centre, Holy Angels and the Older Persons Forum	2020-2025	Annual increase in the number of Carlow tourism businesses with an access for all policy.		   
		2020 - 2025	Ongoing review of strategy to analyse success in implementation of goals and actions and identifying measurable outcomes.		  

Pillar 2: Visitor Experience and Product Development including Festivals and Events

Goal: Identify opportunities for product enhancement and visitor experience development that align with the vision and themes of the Ireland's Ancient East brand and with visitor target market segments.

	Action	Lead Agency	
02.01	Develop a feasibility study for a new flagship attraction in Carlow Town which links the industrial and scientific historic sites, ancestors and experiences throughout County Carlow.	Carlow County Council	

Theme 1: A Journey through Time - Early Settlers

	Action	Lead Agency	
02.02	Investigate the opportunities to enhance the visitor experience at the Brownshill Dolmen to include land acquisition, a coach and car park, improved site lines, enhanced site access and visitor interpretation. Explore associated funding opportunities.	Carlow County Council OPW	
02.03	Consider development of a Bronze-age themed destination for north Carlow and south Wicklow in collaboration with Wicklow County Council e.g. with a focus on inter-county trails development and medium-term experience development opportunities.	Carlow County Council Wicklow County Council	

Ecclesiastical Era

	Action	Lead Agency	
02.04	Commission new feasibility study into, and seek funding for, the collaborative upgrade of the St. Mullins monastery site and Norman motte as an integrated visitor experience in partnership with OPW and the local community.	Carlow County Council OPW	

Partners	Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
Carlow College, St. Patrick's Carlow County Museum Carlow Library Fáilte Ireland Carlow Tourism	2021-2022	Feasibility Study commissioned.	€25,000 - €30,000	<div style="background-color: #800000; color: white; padding: 2px; margin-bottom: 2px;">8 DECENT WORK AND ECONOMIC GROWTH</div> <div style="background-color: #FFA500; color: white; padding: 2px; margin-bottom: 2px;">11 SUSTAINABLE CITIES AND COMMUNITIES</div> <div style="background-color: #000080; color: white; padding: 2px;">17 PARTNERSHIPS FOR THE GOALS</div>

Partners	Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
Carlow County Museum Carlow Tourism Fáilte Ireland CHAS	2021-2022	Opportunities identified to enhance Brownhill Dolmen. Funding secured for site enhancement.	€20,000 feasibility study. Potential sources of funding: Fáilte Ireland Capital funding/ LEADER programme	<div style="background-color: #FFA500; color: white; padding: 2px; margin-bottom: 2px;">11 SUSTAINABLE CITIES AND COMMUNITIES</div> <div style="background-color: #000080; color: white; padding: 2px;">17 PARTNERSHIPS FOR THE GOALS</div>
Carlow County Museum Carlow Tourism Fáilte Ireland CHAS	2022-2025	Early Settlers theme explored.		<div style="background-color: #800000; color: white; padding: 2px; margin-bottom: 2px;">8 DECENT WORK AND ECONOMIC GROWTH</div> <div style="background-color: #FFA500; color: white; padding: 2px; margin-bottom: 2px;">11 SUSTAINABLE CITIES AND COMMUNITIES</div> <div style="background-color: #000080; color: white; padding: 2px;">17 PARTNERSHIPS FOR THE GOALS</div>

Partners	Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
Fáilte Ireland Local community Carlow Tourism	2021	Feasibility study commissioned. Opportunities identified for enhancement of St. Mullins heritage site Visitor experience enhanced.	€25,000 - €30,000	<div style="background-color: #800000; color: white; padding: 2px; margin-bottom: 2px;">8 DECENT WORK AND ECONOMIC GROWTH</div> <div style="background-color: #FFA500; color: white; padding: 2px; margin-bottom: 2px;">11 SUSTAINABLE CITIES AND COMMUNITIES</div> <div style="background-color: #000080; color: white; padding: 2px;">17 PARTNERSHIPS FOR THE GOALS</div>

Ecclesiastical Era

	Action	Lead Agency	Partners
02.05	<p>Develop one day County Carlow Spiritual Highlights Tour with a focus on 6-8 key ecclesiastical sites.</p> <p>Progressively upgrade the visitor experience and interpretation at these sites.</p>		<p>Members of the Carlow Trails of the Saints Committee: Carlow County Council Carlow County Museum Carlow Tourism CHAS Carlow College, St. Patrick's IT Carlow Other partners for inclusion OPW Fáilte Ireland</p>
02.06	<p>Investigate opportunity to enhance the visitor experience at Clonmore Castle and monastic site to include enhanced trail network and associated visitor access, and site interpretation.</p>	Carlow County Council	<p>OPW Carlow Tourism Fáilte Ireland CHAS</p>

Norman Strongholds

	Action	Lead Agency	Partners
02.07	<p>Examine potential for enhancing public realm at Carlow Castle and with linkages to River Barrow.</p>	Carlow County Council	<p>OPW Carlow Town Development Forum Carlow County Museum Carlow Tourism Fáilte Ireland</p>
02.08	<p>Develop a Carlow Castles Trail linking key sites in the county.</p>	Carlow Tourism/ Carlow County Museum	<p>Carlow County Council OPW Fáilte Ireland</p>

	Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
	2020-2021	County Carlow Spiritual Highlights Tour developed. Visitor experience enhancements identified, and funding opportunities explored.	€2,000 (soft copy flyer and social media exposure). Potential source of funding: Town and Village programme	  
	2022-2025	Opportunities identified to enhance visitor experience at Clonmore Castle.		  

	Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
	2023	Identify opportunities for public realm enhancement at Carlow Castle.		     
	2020-2021	Carlow Castles Trail developed.	€4,000 (soft copy flyer and website and social media exposure)	  

Theme 2: Big Houses & Beautiful Gardens

Ireland's Big House Capital

	Action	Lead Agency	
02.09	Work with OPW to develop Altamont House and Gardens as a significant visitor experience for County Carlow.	OPW	
02.10	Identify the key strategic projects required to enhance the attractiveness of Duckett's Grove as a visitor attraction and seek funding to implement these projects.	Carlow County Council	

Blooming Gardens

	Action	Lead Agency	
02.11	<p>Continue to raise awareness of County Carlow's big houses and gardens through continued support for the Carlow Garden and Houses Trail, Carlow Garden Festival and Carlow's Big Houses Festival.</p> <p>Explore opportunities to develop a pilot garden bus tour in association with Ring a Link.</p>	Carlow Tourism/Carlow Garden Trail Committee	

Theme 3: Valleys Views and Vales

Do It The Barrow Way

	Action	Lead Agency	
02.12	Work with Waterways Ireland to update and revisit actions outlined in <i>The Barrow Corridor Recreational, Tourism and Commercial Product Identification Study</i> to cover water-based activities provision, Barrow Way walking route, support facilities, industrial heritage enhancement (e.g. use of lock houses as visitor accommodation), watersports hubs (e.g. Carlow Town Park, Graiguenamanagh/Tinnahinch, Clashganny, Bagenalstown and St. Mullins), universal angling access, fish stocks, orientation/directional/interpretative signage, and linkages to nearby heritage attractions.	Waterways Ireland Carlow County Council	

Partners	Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
Carlow County Council Carlow Tourism Fáilte Ireland	2020-2025	Altamont House & Gardens visitor experience enhanced.		8 DECENT WORK AND ECONOMIC GROWTH 11 SUSTAINABLE CITIES AND COMMUNITIES 17 PARTNERSHIPS FOR THE GOALS
Fáilte Ireland Carlow Tourism	2021-2023	Prioritise list of projects and seek funding for delivery.		8 DECENT WORK AND ECONOMIC GROWTH 11 SUSTAINABLE CITIES AND COMMUNITIES 15 LIFE ON LAND 17 PARTNERSHIPS FOR THE GOALS

Partners	Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
Carlow County Council Fáilte Ireland	2020-2025	Annual Carlow Big Houses and Carlow Garden Festivals. Feasibility for pilot garden bus tour determined in collaboration with Ring-A-Link.	€5,000 - €10,000 for updating of the Carlow Garden Trail to include print and soft copy collateral and signage upgrades.	8 DECENT WORK AND ECONOMIC GROWTH 11 SUSTAINABLE CITIES AND COMMUNITIES 15 LIFE ON LAND 17 PARTNERSHIPS FOR THE GOALS

Partners	Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
Carlow Outdoor Recreation Partnership (CORP)	2020-2025	Support the delivery of <i>The Barrow Corridor Recreational, Tourism and Commercial Product Identification Study.</i>		3 GOOD HEALTH AND WELL-BEING 6 CLEAN WATER AND SANITATION 8 DECENT WORK AND ECONOMIC GROWTH 9 INDUSTRY, INNOVATION AND INFRASTRUCTURE 10 REDUCED INEQUALITIES 11 SUSTAINABLE CITIES AND COMMUNITIES 14 LIFE BELOW WATER 17 PARTNERSHIPS FOR THE GOALS

Theme 3: Valleys Views and Vales

Do It The Barrow Way

	Action	Lead Agency	
02.13	Investigate opportunity to develop loop walks between River Barrow and visitor hubs and to visitor attractions along the river corridor.	Carlow Outdoor Recreation Partnership (CORP)	

Reach for the Sky

	Action	Lead Agency	
02.14	Commissioning a feasibility study into and seeking funding for development of a new Adventure Centre or similar mobile facility as outlined in the <i>County Carlow Outdoor Recreation Strategy</i> , with potential multiple uses across outdoor recreation, arts, music and heritage.	Carlow Outdoor Recreation Partnership (CORP)	
02.15	Investigate opportunities to develop the walking offer in the Blackstairs including: <ul style="list-style-type: none">- Off-road link option between the end of the Wicklow Way and start of the South Leinster Way (Clonegal and Kildavin)- An off-road walking route between Borris and the Blackstairs. Establish a South Leinster Way Committee to involve all stakeholders and oversee the planned development, management and maintenance of the route- Columban Way Walking Trail (trailhead Myshall)	Carlow Outdoor Recreation Partnership (CORP)	
02.16	Formal consultation with the Blackstairs Farming Group project to realise their objectives as they relate to outdoor recreation.	Carlow Outdoor Recreation Partnership (CORP)	

Slaney Excursions

	Action	Lead Agency	
02.17	Investigate opportunity to improve community and visitor access to the River Slaney including: <ul style="list-style-type: none">- Enhanced riverside pathways and facilitate river-based activities at Tullow- A 'Rathvilly River Trail'	Carlow Outdoor Recreation Partnership (CORP)	

Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
2020-2025	River Barrow loop walks developed.	Potential source of funding: ORIS	<div style="display: flex; flex-wrap: wrap;"> <div style="width: 50%;"> <p>3 GOOD HEALTH AND WELL-BEING</p> <p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</p> <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p> </div> <div style="width: 50%;"> <p>14 LIFE BELOW WATER</p> <p>15 LIFE ON LAND</p> <p>17 PARTNERSHIPS FOR THE GOALS</p> </div> </div>

Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
2021-2022	Feasibility study commissioned Adventure Centre/ Mobile Centre operational.	Feasibility study €20,000 - €25,000	<div style="display: flex; flex-wrap: wrap;"> <div style="width: 50%;"> <p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</p> <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p> </div> <div style="width: 50%;"> <p>14 LIFE BELOW WATER</p> <p>17 PARTNERSHIPS FOR THE GOALS</p> </div> </div>
2020-2025	Blackstairs walking offer enhanced. Opportunities to increase dwell time in towns and villages. Functioning South Leinster Way Committee.	Potential source of funding: ORIS	<div style="display: flex; flex-wrap: wrap;"> <div style="width: 50%;"> <p>3 GOOD HEALTH AND WELL-BEING</p> <p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</p> </div> <div style="width: 50%;"> <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p> <p>14 LIFE BELOW WATER</p> <p>17 PARTNERSHIPS FOR THE GOALS</p> </div> </div>
2020	Shared projects with Blackstairs Farming Group. Opportunities for co-operation in respect of outdoor recreation.		<div style="display: flex; flex-wrap: wrap;"> <div style="width: 50%;"> <p>3 GOOD HEALTH AND WELL-BEING</p> <p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</p> </div> <div style="width: 50%;"> <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p> <p>14 LIFE BELOW WATER</p> <p>17 PARTNERSHIPS FOR THE GOALS</p> </div> </div>

Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
2020-2025	Access to River Slaney improved. Increased opportunities for provision of river-based activities.	Outdoor Recreation Strategy budget	<div style="display: flex; flex-wrap: wrap;"> <div style="width: 50%;"> <p>3 GOOD HEALTH AND WELL-BEING</p> <p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</p> <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p> </div> <div style="width: 50%;"> <p>14 LIFE BELOW WATER</p> <p>15 LIFE ON LAND</p> <p>17 PARTNERSHIPS FOR THE GOALS</p> </div> </div>

Room to Breathe

	Action	Lead Agency	
02.18	<p>Create opportunities to increase visitor dwell time in towns and villages through enhancement of the walking offer including:</p> <ul style="list-style-type: none"> - Feasibility study for the development of a walk/cycle trail between Saint Mullins and New Ross - Positioning Borris (by implementing measures as outlined in the <i>'Borris Our Vision' Study</i>), and Myshall as walking hubs, and Carlow Town as a hub for the River Barrow and Barrow Walking Way route - Developing loop walks between long distance walking routes and key towns and villages - Identify the process for the further development of the Borris Viaduct as a walking trail - Review of the Clashganny water recreation facility model - Support implementation of the walking development plan under the <i>Outdoor Recreation Strategy</i> which includes the potential for improved links across the River Barrow near Carlow IT back into Carlow Town and en-route to Milford 	Carlow Outdoor Recreation Partnership (CORP)	
02.19	<p>Create opportunities to increase visitor dwell time in towns and villages through enhancement of the cycling offer including:</p> <ul style="list-style-type: none"> - Assessment of potential for off-road greenways e.g. at Tullow and Bagenalstown - Review and continue to deliver existing and planned routes being developed by Carlow Sports Partnership - Consider inclusion of cycle routes on the Carlow Outdoors website - Support implementation of cycling development plan under the <i>Carlow Outdoor Recreation Strategy</i> which includes the potential for improved links across the River Barrow near Carlow IT back into Carlow Town and en-route to Milford along with the development of a short Greenway for recreational cycling 	Carlow Outdoor Recreation Partnership (CORP)	
02.20	<p>Enhance the public realm and visitor offer in Carlow's towns and villages to benefit residents and visitors including:</p> <ul style="list-style-type: none"> - Carlow – implementation of public realm measures identified under the <i>Carlow Town Regeneration Vision and Implementation Strategy (RVIS)</i> and the development of the Cultural Quarter, reflecting Destination Town principles. Ensure a range of actions are implemented to develop Carlow Town as a strategic visitor hub - Bagenalstown/Muine Bheag – develop signage and visitor infrastructure, undertake public realm enhancements in the town core and other measures as outlined in the <i>Bagenalstown Local Area Plan 2017-2023</i> - Tullow – undertake physical public realm interventions such as signage and paving, consider a market or local outlet for food and craft - Borris – implement measures outlined in the <i>Borris – Our Vision</i> document including enhancing the public realm 	Carlow County Council	
02.21	<p>Support delivery of the Carlow Outdoor Recreation Strategy including:</p> <ul style="list-style-type: none"> - Delivery of the <i>County Carlow Cycling and Walking Strategy</i> priority actions - Evaluate the connectivity of current cycling and walking products - Increase in awareness of, and the number of outdoor recreation programmes with seasonal county "Active Outdoors" programme and timetable - Seasonal outdoor recreation timetables and initiatives in urban play areas, formal gardens and trails - Support outdoor recreation in urban environments in County Carlow under the review of the current County Development Plan <p>Support the development of additional outdoor recreation infrastructure in line with the County Carlow Walking and Cycling Implementation Plan.</p>	Carlow Outdoor Recreation Partnership (CORP)	
02.22	<p>Explore opportunities to develop existing stand-alone Blueway sites based on the eat, stay and play principle.</p>	Carlow Outdoor Recreation Partnership (CORP)	

	Partners	Timescale	Key Performance Indicator	Indicative Budget/ Potential Sources of funding € - annual	SDG Linkages
		2020-2025	Town and village walking linkages and loops developed.	Potential source of funding: ORIS/ Outdoor Recreation Strategy budget	<div style="display: flex; flex-wrap: wrap; gap: 5px;"> <div style="background-color: #28a745; color: white; padding: 5px; margin-right: 5px;">3 GOOD HEALTH AND WELL-BEING</div> <div style="background-color: #17a2b8; color: white; padding: 5px; margin-right: 5px;">14 LIFE BELOW WATER</div> <div style="background-color: #dc3545; color: white; padding: 5px; margin-right: 5px;">8 DECENT WORK AND ECONOMIC GROWTH</div> <div style="background-color: #28a745; color: white; padding: 5px; margin-right: 5px;">15 LIFE ON LAND</div> <div style="background-color: #ffc107; color: white; padding: 5px; margin-right: 5px;">9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</div> <div style="background-color: #003366; color: white; padding: 5px; margin-right: 5px;">17 PARTNERSHIPS FOR THE GOALS</div> <div style="background-color: #ffc107; color: white; padding: 5px;">11 SUSTAINABLE CITIES AND COMMUNITIES</div> </div>
		2021-2025	Enhanced cycling opportunities both on-road and off-road.	Potential source of funding: ORIS/ Outdoor Recreation Strategy budget	<div style="display: flex; flex-wrap: wrap; gap: 5px;"> <div style="background-color: #28a745; color: white; padding: 5px; margin-right: 5px;">3 GOOD HEALTH AND WELL-BEING</div> <div style="background-color: #ffc107; color: white; padding: 5px; margin-right: 5px;">11 SUSTAINABLE CITIES AND COMMUNITIES</div> <div style="background-color: #dc3545; color: white; padding: 5px; margin-right: 5px;">8 DECENT WORK AND ECONOMIC GROWTH</div> <div style="background-color: #17a2b8; color: white; padding: 5px; margin-right: 5px;">14 LIFE BELOW WATER</div> <div style="background-color: #ffc107; color: white; padding: 5px; margin-right: 5px;">9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</div> <div style="background-color: #003366; color: white; padding: 5px; margin-right: 5px;">17 PARTNERSHIPS FOR THE GOALS</div> </div>
	Carlow LCDC Carlow Tourism Fáilte Ireland Visitor Attractions	2020-2025	Measures undertaken to enhance the public realm in Carlow Town, Bagenalstown, Tullow and Borris.		<div style="display: flex; flex-wrap: wrap; gap: 5px;"> <div style="background-color: #dc3545; color: white; padding: 5px; margin-right: 5px;">8 DECENT WORK AND ECONOMIC GROWTH</div> <div style="background-color: #17a2b8; color: white; padding: 5px; margin-right: 5px;">14 LIFE BELOW WATER</div> <div style="background-color: #ffc107; color: white; padding: 5px; margin-right: 5px;">9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</div> <div style="background-color: #28a745; color: white; padding: 5px; margin-right: 5px;">15 LIFE ON LAND</div> <div style="background-color: #ffc107; color: white; padding: 5px; margin-right: 5px;">11 SUSTAINABLE CITIES AND COMMUNITIES</div> <div style="background-color: #003366; color: white; padding: 5px; margin-right: 5px;">17 PARTNERSHIPS FOR THE GOALS</div> <div style="background-color: #ffc107; color: white; padding: 5px;">12 RESPONSIBLE CONSUMPTION</div> </div>
		2020-2025	Increase in trail management, maintenance and development resources. Seasonal outdoor recreation activity timetables and events.	Potential source of funding: ORIS/ Outdoor Recreation Strategy budget	<div style="display: flex; flex-wrap: wrap; gap: 5px;"> <div style="background-color: #28a745; color: white; padding: 5px; margin-right: 5px;">3 GOOD HEALTH AND WELL-BEING</div> <div style="background-color: #ffc107; color: white; padding: 5px; margin-right: 5px;">11 SUSTAINABLE CITIES AND COMMUNITIES</div> <div style="background-color: #dc3545; color: white; padding: 5px; margin-right: 5px;">8 DECENT WORK AND ECONOMIC GROWTH</div> <div style="background-color: #003366; color: white; padding: 5px; margin-right: 5px;">17 PARTNERSHIPS FOR THE GOALS</div> <div style="background-color: #ffc107; color: white; padding: 5px;">9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</div> </div>
		2022 – 2025	Enhance opportunities for outdoor recreation.		<div style="display: flex; flex-wrap: wrap; gap: 5px;"> <div style="background-color: #28a745; color: white; padding: 5px; margin-right: 5px;">3 GOOD HEALTH AND WELL-BEING</div> <div style="background-color: #ffc107; color: white; padding: 5px; margin-right: 5px;">11 SUSTAINABLE CITIES AND COMMUNITIES</div> <div style="background-color: #dc3545; color: white; padding: 5px; margin-right: 5px;">8 DECENT WORK AND ECONOMIC GROWTH</div> <div style="background-color: #003366; color: white; padding: 5px; margin-right: 5px;">17 PARTNERSHIPS FOR THE GOALS</div> <div style="background-color: #ffc107; color: white; padding: 5px;">9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</div> </div>

Theme 4: Inspired by Carlow

Rejoice and Revel

	Action	Lead Agency	
02.23	<p>Continue investment in existing flagship festivals such as:</p> <ul style="list-style-type: none"> - Borris House Festival of Writing and Ideas - Carlow Arts Festival - Carlow Garden Festival - Pan Celtic Festival <p>Consider developing shoulder season new events in collaboration with strategic partners such as:</p> <ul style="list-style-type: none"> - Carlow Outdoor Adventure Festival incorporating an adventure event similar in scale to Reeks 5, based in Borris, that drives off/shoulder season visitors and that includes accommodation and travel packages - County wide climate change/eco/green festival - International Achievers Festival - Big Houses Festival - Riverfest or Barrow Regatta 	Carlow County Council	
02.24	<p>Review schedule and commercial viability of festivals and events, and from findings develop a new festivals and events strategy. Key elements to include:</p> <ul style="list-style-type: none"> - Successful themed festivals explored to be enhanced or extended or collaboration established to operate festivals going forward - Identification of potential large events and commence process of engaging with event organisers to host within the County of Carlow - Work with key stakeholders to create themed after-dark night economy to meet international visitor expectations to target international visitor - Continue to develop a continuous and coordinated schedule of events year round and promote same through proactive marketing campaigns on and offline and via stakeholder channels 	Carlow County Council	
02.25	<p>Consider development of an Emigrant Trail that celebrates the county diaspora and further twinning and diaspora objectives.</p>	Carlow County Museum/ Carlow Tourism	

	Partners	Timescale	Key Performance Indicator	Indicative Budget/ Potential Sources of funding € - annual	SDG Linkages
	Carlow LCDC/CCDP Carlow Tourism Carlow Outdoor Recreation Partnership (CORP) Festival Organisers Fáilte Ireland	2020	Ongoing investment to grow flagship festivals. Facilitation of new festivals.		<div style="background-color: #800000; color: white; padding: 2px; margin-bottom: 2px;">8 DECENT WORK AND ECONOMIC GROWTH</div> <div style="background-color: #FFA500; color: white; padding: 2px; margin-bottom: 2px;">11 SUSTAINABLE CITIES AND COMMUNITIES</div> <div style="background-color: #000080; color: white; padding: 2px;">17 PARTNERSHIPS FOR THE GOALS</div>
		2021	Festival and Events Strategy completed.		<div style="background-color: #800000; color: white; padding: 2px; margin-bottom: 2px;">8 DECENT WORK AND ECONOMIC GROWTH</div> <div style="background-color: #FFA500; color: white; padding: 2px; margin-bottom: 2px;">11 SUSTAINABLE CITIES AND COMMUNITIES</div> <div style="background-color: #000080; color: white; padding: 2px;">17 PARTNERSHIPS FOR THE GOALS</div>
		2021	Carlow Emigrant Trail established.		<div style="background-color: #800000; color: white; padding: 2px; margin-bottom: 2px;">8 DECENT WORK AND ECONOMIC GROWTH</div> <div style="background-color: #FFA500; color: white; padding: 2px; margin-bottom: 2px;">11 SUSTAINABLE CITIES AND COMMUNITIES</div> <div style="background-color: #000080; color: white; padding: 2px;">17 PARTNERSHIPS FOR THE GOALS</div>

The Cultural Quarter

	Action	Lead Agency	Partners
02.26	Delivery of a Fáilte Ireland Destination Towns Agenda for County Carlow including the implementation of the <i>Carlow Town Regeneration Vision and Implementation Strategy (RVIS)</i> with particular focus on the tourism potential of the Cultural Quarter, River Barrow, traditional town centre, Carlow Castle, public activity spaces and other cultural and heritage assets.	Carlow County Council	Fáilte Ireland Carlow College, St. Patrick's Carlow County Museum Carlow Cathedral Carlow Library Carlow Tourism Carlow Town Development Forum County Carlow Chamber of Commerce
02.27	Complete a review of the potential of VISUAL by initiating a shared long-term tourism plan to drive increasing numbers of international and domestic visitors to the venue.	Carlow County Council/ VISUAL	Carlow College, St. Patrick's Carlow County Museum Carlow Library Fáilte Ireland

Pillar 3: Capacity Development

Goal: To strengthen the capacity of industry to create and promote experiences that will attract priority segments from key markets

	Action	Lead Agency	Partners
03.01	Determine the appropriate linkages and training interventions required through inter-agency co-operation and collaboration, to develop high quality full-time and part-time tourism positions.	Regional Skills Forum	IT Carlow (Lifelong Learning) Carlow County Council / LEO Skillnets CKETB Carlow Tourism Fáilte Ireland Tourism trade Private training providers PPN County Carlow Chamber of Commerce

	Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
	2020-2025	Carlow Cultural Quarter defined and developed.		8 DECENT WORK AND ECONOMIC GROWTH 9 INDUSTRY, INNOVATION AND INFRASTRUCTURE 11 SUSTAINABLE CITIES AND COMMUNITIES 17 PARTNERSHIPS FOR THE GOALS
	2021 - 2022	Enhanced recognition of VISUAL amongst national and international visitors. Increased visitor numbers.	€25,000 - €30,000	

	Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
	2021-2025	Increase employment opportunities for Carlow residents in the tourism industry.		5 GENDER EQUALITY 8 DECENT WORK AND ECONOMIC GROWTH 10 REDUCED INEQUALITIES 11 SUSTAINABLE CITIES AND COMMUNITIES 17 PARTNERSHIPS FOR THE GOALS

	Action	Lead Agency	Partners	
03.02	Support capacity of owners of publicly accessible big houses to develop compelling visitor attractions in the context of the 'Tale of Two Worlds' experience theme within the Ireland's Ancient East brand.	Carlow Tourism/ Fáilte Ireland	Service providers Carlow LCDC	
03.03	Support tourism providers and domestic and overseas tour operators to develop day tour or multi-day tour packages to include transport (small group bus and/or train), accommodation, garden tours and other visitor experiences that are aligned with Ireland's Ancient East themes. Facilitate and encourage face to face meetings by key industry members with ITOA and Meitheal partners, e.g. Abbey Tours etc. to engage and drive international visitors (to be completed after itineraries are defined). Facilitate fam trips/education workshop for ITOA members to experience first-hand the international market ready visitor attractions and Carlow product.	Carlow Tourism	Carlow Tourism members Fáilte Ireland ITOA Overseas tour operators Domestic coach tour operators (CTTC) Carlow LCDC	
03.04	Support tourism providers to develop bundled food and drink offers that involve food, drink, accommodation and activity product throughout the county. Encourage tourism businesses including hotels, attractions, cafés and restaurants to source local produce to increase local revenue from tourism.	Carlow Tourism	Carlow County Council Service providers Fáilte Ireland – Taste the Island	
03.05	Create an overview of training opportunities and information on the Carlow Tourism website and via e-zines linking to supports provided by Fáilte Ireland, Carlow LEO and other business supports. Provide strong training supports and benefits package through: - Assessment of needs - Programme of supports to address needs Facilitate training and education opportunities for those currently in employment who wish to up-skill within the tourism sector or those seeking new employment in the sector by informing and disseminating information on current training opportunities.	Carlow LEO, Fáilte Ireland	Carlow Tourism Tourism industry members Carlow LCDC KCETB Carlow/Kilkenny Skillnets County Carlow Chamber of Commerce	
03.06	Encourage and facilitate tourism businesses to reduce their impact upon the environment and carbon footprint by reducing their energy demand, increasing recycling, minimising single plastic use and utilising best practice procurement policy where possible by disseminating best practice information, case studies and workshops.	Carlow County Council (Environment/LEO)	Fáilte Ireland 3 Counties Energy Agency Eco Tourism Ireland Sustainable Energy Authority of Ireland (SEAI) Environmental Protection Agency (EPA) Carlow Tourism	

Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
2020-2025	Visitor experience enhanced at publicly accessible big houses.	€10,000	  
2021-2025	<p>Series of experience tours developed.</p> <p>Meetings held with key representatives of ITOA and domestic and international tour operators.</p> <p>ITOA members invited to annual fam visits to County Carlow.</p>	<p>€2,000 – face to face meetings with ITOA and domestic and international partners</p> <p>€2,000 per fam trip of ITOA members</p>	   
2021-2023	Bundled food and drink offer developed and promoted.	€10,000	     
2020-2025	<p>Tourism trade engaged in Fáilte Ireland and Carlow LEO business supports.</p> <p>Needs assessed and capacity building measures delivered.</p> <p>Tourism trade engaged in services that support, develop, and progress their businesses.</p>	€1,000 - No significant budget required due to linkage with existing resources.	   
2020-2025	Best practice information and case studies provided to tourism trade and workshops held per annum to communicate best practice.	€1,000 per annum	       

Pillar 4: Partnership Development

Goal: Identify internal and external collaborative opportunities between public, private and community sectors that maximise return on investment and that facilitate the development of enterprises and experiences around a shared vision and ambition.

	Action	Lead Agency	Partners	
04.01	Work with neighbouring local authorities to collaboratively develop inter-county linkages e.g. pedestrian bridge between St. Mullins and County Kilkenny across the River Barrow with looped walk along the Wexford stretch of the river to return to St. Mullins; and Greenway to New Ross via former rail network.	Carlow County Council	Kilkenny County Council Wexford County Council Waterford County Council National Trails Office Fáilte Ireland CCDP and KLP	
04.02	Discuss, identify, and prioritise collaborative opportunities for clustered and joint experience development and promotion of tourism to include inter-county itineraries e.g. Ireland's Ancient East International Gateway Garden Festival.	Carlow Tourism	Carlow County Council Carlow LCDC CCDP and other LEADER partnerships in the region Fáilte Ireland Local Authority Tourism Officers for the Ireland Ancient East region County Carlow Chamber of Commerce	
04.03	Introduce a local Carlow Tourism Ambassador/Champion initiative using key learnings from the Gathering programme.	Carlow Tourism	Carlow County Council Fáilte Ireland Carlow PPN	
04.04	Hold key conversations with external partners including Fáilte Ireland and key members of state agencies to discuss timelines and collaborative opportunities in relation to tourism product and visitor experience development.	Carlow County Council	Carlow Tourism Fáilte Ireland OPW Waterways Ireland Coillte Irish Uplands Council National Trails Office IT Carlow	

Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
2021-2025	<p>Collaborative projects identified with neighbouring local authorities to enhance inter-county recreational offer.</p> <p>Projects developed to best practice recreational guidelines.</p>		<p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</p> <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p> <p>17 PARTNERSHIPS FOR THE GOALS</p>
2020-2025	<p>Collaborative experience development and marketing initiatives between County Carlow and neighbouring counties.</p>		<p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</p> <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p> <p>17 PARTNERSHIPS FOR THE GOALS</p>
2020-2021	<p>Carlow Tourism Ambassador/ Champion activated.</p>		<p>4 QUALITY EDUCATION</p> <p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p> <p>17 PARTNERSHIPS FOR THE GOALS</p>
2020-2021	<p>Meeting held with identified state agencies to discuss timelines and collaborative opportunities in relation to tourism product and experience development.</p>		<p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p> <p>17 PARTNERSHIPS FOR THE GOALS</p>

Pillar 5: Brand and Marketing Communications

Goal: Raise the profile of County Carlow as a high-quality visitor destination that leverages the Ireland's Ancient East brand and attracts more visitors matched to the county's tourism offer.

	Action	Lead Agency	Partners
05.01	<p>Consider bi-annual community and visitor surveys:</p> <ul style="list-style-type: none"> • Online local resident surveys to gauge attitudes to and support for tourism development in host communities • Visitor satisfaction surveys to examine motivation and satisfaction <p>Focus on metrics that benefit communities including growth of revenue from tourism bed-nights, and community satisfaction regarding tourism.</p>	Carlow Tourism	Tourism industry and community groups Carlow PPN TY students Private research company IT Carlow - Masters students
05.02	Re-launch Carlow Tourism brand in the domestic market with use of new strapline that captures the Carlow offer. Follow with dedicated launch to the tourism trade within the county.	Carlow Tourism	Fáilte Ireland Tourism trade
05.03	Consider re-launch of a County Carlow Food and Drink Trail following successful establishment of a County Carlow food network in the context of the new Food and Drink Strategy.	Carlow Tourism Carlow County Council	Fáilte Ireland Taste the Island Food and drink providers
05.04	Budget Planning and Activity Plans including funding agreed to enable initiation of immediate marketing and promotional actions to actively develop domestic and international business for the following three years.	Carlow Tourism	Carlow County Council Carlow LCDC

Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
2021-2025	<p>Bi-annual resident tourism and visitor survey introduced.</p> <p>Key metrics of success identified and reviewed including tourism revenue growth and community satisfaction.</p>	€10,000 if engaging market research company	<p>4 QUALITY EDUCATION</p> <p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</p> <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p> <p>17 PARTNERSHIPS FOR THE GOALS</p>
2020	Carlow tourism brand re-launched in the domestic audience and tourism providers educated as to its ethos and application.	€7,000	<p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p>
2021-2023	Established food network to raise the profile of the County's offering and County Carlow Food and Drink Trail launched.		<p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</p> <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p> <p>12 RESPONSIBLE CONSUMPTION</p> <p>13 CLIMATE ACTION</p> <p>17 PARTNERSHIPS FOR THE GOALS</p>
2021-2023	<p>Three-year budget planning and activity plans created.</p> <p>Enhanced marketing.</p>		<p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p> <p>17 PARTNERSHIPS FOR THE GOALS</p>

	Action	Lead Agency	
05.05	Raising Awareness and Promotion Drive awareness of Carlow offer through use of social media and digital influencers.	Carlow Tourism	
	Target large corporate companies in Dublin with younger demographic employees for weekend activities and entertainment.	Carlow Tourism	
	Encourage greater Carlow local community awareness of the Carlow tourism offer through open days and promotion e.g. 'Spend a day in Carlow', 'Come and Try It', and encouraging use of local walks.	Carlow Tourism	
	Encourage greater tourism trade awareness of the Carlow tourism offer through familiarisation events.	Carlow Tourism	
	Target overseas students' families at IT Carlow, through the provision of themed itineraries which can be communicated from the International Office in IT Carlow. Would appeal and encourage out of season engagement.	Carlow Tourism	
	Explore the opportunities for Teagasc, Carlow College, St. Patrick's and IT Carlow to secure niche scientific, environmental and educational conferences that could be attracted to Carlow.	IT Carlow/ Carlow College, St. Patrick's and Teagasc	
	Explore the potential of VISUAL as a unique and alternative venue for day conferences in partnership with local hotels.	VISUAL/hotel providers	
	Attend national and international consumer fairs with a focus on increasing international visitors to County Carlow including World Travel Market in London, ITB in Berlin and Meitheal. Continue to attend the present domestic consumer shows annually e.g. The National Ploughing Championship, Bloom, Active Retired Showcase and The Holiday World Show.	Carlow Tourism	
Through offline and online channels, communicate defined itineraries, targeting the active retired market, gardening clubs on the island of Ireland, golf societies, bridge clubs, ladies' associations – Macra na Feirme, Culturally Curious, Great Escapers, Connected Families and Empty Nesters.	Carlow Tourism		

Partners	Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
Tourism Ireland Fáilte Ireland Influencers	2020-2025	Domestic and international influencers targeted for promotion of County Carlow tourism offer.		     
IT (Facebook, Google, LinkedIn, Twitter, Zendesk, Intel) Legal, financial and insurance companies	2020-2021	Promotion of visitor experiences to 20 large companies in Dublin, prioritising those with high numbers of Millennial age staff.		
Carlow PPN Carlow resident and business community incl County Carlow Chamber of Commerce	2020	Open days and Come and Try It days held for Carlow residents and student.		
Carlow tourism trade	2020	Regular familiarisation days held for Carlow Tourism members.		
IT Carlow	2020-2021	Range of activity experience packages developed specifically for overseas students and their families at IT Carlow.		
Carlow Tourism	2021	Number of conferences secured.		
Carlow Tourism	2021	Number of day conferences held in VISUAL.		
Tourism Ireland Fáilte Ireland	2020-2025	Carlow Tourism attend at least three international travel consumer fairs annually to promote the Carlow B2B and B2C.		
Target market associations	2020	Promote defined itineraries to key target markets for domestic audience.		

	Action	Lead Agency	Partners	
05.06	<p>Communications and Collaboration Prioritise continued participation in collaborative marketing initiatives under the Ireland's Ancient East brand with Fáilte Ireland and neighbouring counties.</p> <p>Engage with Tourism Ireland and Industry and Co-operative marketing opportunities, e.g. Ireland.com community.</p> <p>Engage with Fáilte Ireland in the development and implementation of Visitor Experience Development Plans.</p> <p>Work strongly with both Fáilte Ireland International Publicity department and Tourism Ireland, to host media visits and hosted buyer's fam trips to the region.</p>	Carlow Tourism	Fáilte Ireland Carlow Garden Trail Tourism Officer - Carlow/KK/Wexford/ Wicklow	
5.07	<p>Digital Marketing Define annual KPI's to be achieved Website content reviewed and relevant to increase traffic to the site Create an annual content calendar detailing planned posts for social media activity Subject to funding enhance and redesign of carlowtourism.com/to include:</p> <ul style="list-style-type: none"> • Reflection of brand and tagline changes • Enhancement of user experience • Review of overall site content and SEO • Populate new Carlow Tourism tagline • Homepage – content reviewed to show Top 10 reasons to visit Carlow/Things to do sections and links to suggested programmes/itineraries of 1/2/3 nights stays aimed at the defined market segments in the strategy • Video footage created and embedded to communicate the Carlow offer. Video footage to focus on the specific identified themes which can be used for both domestic and promotional purposes • Continually engage with emerging technologies for the benefit of the tourism sector 	Carlow Tourism		
5.08	<p>Strengthen the outdoors recreation brand and messaging within County Carlow based on a “soft and slow” approach.</p> <p>Identify how Carlow and neighbouring county outdoor recreation branding sits within the Ireland's Ancient East brand.</p>	Carlow Outdoor Recreation Partnership (CORP)		

Timescale	Key Performance Indicator	Indicative Budget/Potential Sources of funding € - annual	SDG Linkages
2020-2025	<p>IAE collaborative marketing initiatives.</p> <p>Continued engagement with key stakeholders with regards to communications.</p>		<p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>17 PARTNERSHIPS FOR THE GOALS</p>
<p>2020-2021</p> <p>2020-2021</p> <p>2020</p> <p>2020-2021</p>	<p>Digital marketing objectives achieved.</p> <p>Website content reviewed and updated.</p> <p>Annual social media content calendar created.</p> <p>Funding obtained to enhance Carlow Tourism website.</p>		<p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p>
2025	County Carlow outdoor recreation brand and messaging reviewed and enhanced.		<p>8 DECENT WORK AND ECONOMIC GROWTH</p> <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p> <p>17 PARTNERSHIPS FOR THE GOALS</p>

MONITORING AND EVALUATION

5.1

Introduction

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

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

5.2

Monitoring Areas and Indicators

The establishment of a comprehensive informative baseline forms part of the actions set out above. A key outcome of the information gathering process is to be able to assess the performance of the county in attracting additional tourist numbers, additional tourist spend and improved tourist and resident satisfaction through bi-annual surveys (see action 05.01). It will also be important to examine the motivations of those who are attracted to the county and how these align with the underlying proposition for the region. This will include measures such as the following:

- increased awareness of the county and its attractions;
- increased visitor satisfaction in the county;
- maximised revenue and length of stay in County Carlow;
- increased accommodation revenue;
- increased number of accommodation providers;
- increased visitor numbers to the county to attractions and events;
- longer tourist season within the county;
- increase in number of Fáilte Ireland registered attractions and services;
- increased employment levels in the tourism sector and in complementary sectors; and
- relative performance in the Ireland's Ancient East destination area and nationally

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

Monitoring of the organisation of tourism will allow the benefits of networks, coordination between partners and the development of common goals to be examined. This will include measures such as examining the number of partnership projects developed or the extent of linkages between themed assets in other parts of the region (e.g. Greenways or the Blackstairs Mountains Partnership).

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

Monitoring the regional promotion and marketing of Ireland's Ancient East will be important to ensure that the timing and message align with events, opportunities and activity in the county to best effect. Monitoring communication will also address the dissemination of information to local accommodation providers, attractions, and tourism related businesses.

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

Measuring the value for money of investment in tourism offers is essential. The baseline report for this strategy has provided information in relation to how tourism is currently performing. However, additional information on tourist origin, type of tourism (e.g. business etc.), and average spend through visitor surveys will allow a more accurate picture to develop and assist in identifying the impact of investment in the sector. The gathering of ongoing attraction and event specific information on visitor numbers and the tourism profile of

the county, as outlined above, is a short-term action of this strategy and is necessary to allow its success to be measured. In the medium-term, working with Carlow Tourism, Carlow County Council and Fáilte Ireland, this will combine with wider information on visitor spending and patterns of use to derive economic impact and levels of satisfaction.



Huntington
Castle

5.3

Evaluation

The impact of the Tourism Strategy should be monitored and evaluated. This can be done by examining it in terms of impact making tourism a more sustainable form of development e.g. performance in terms of the impact on Visitor, Industry, Community and Environment. Areas of importance will comprise the following areas:

- economic – contribution to local economic performance, including spend in the county, increased employment in relevant sectors, such as accommodation and food, increases in new business formation etc.;
- social – increased awareness of value of local environment and engagement by local communities in tourism;
- image and identity – does the strategy enable a perception of County Carlow aligned with its recommended brand, and does this identity support the wider promotion of the county;
- environmental – does tourism development lead to improved or degraded environmental performance, such as quality of protected areas or increased traffic;
- organisational – does the strategy enhance organisational goals, improve partnerships and networks within the county and across the South-East Region and Ireland's Ancient East destination.

It is recommended that a **mid-point evaluation** be undertaken in 2022 to determine whether implementation of the strategy is achieving stated objectives.

APPENDIX 1

CONSULTEES

- **Board of Carlow Tourism**
- **Carlow County Council**
 - » Chief Executive and Management Team
- » Local Enterprise Office and community department
 - » Carlow Sports Partnership
 - » Arts Officer
 - » Curator Carlow County Museum
 - PPN Co-ordinator
 - **Director of VISUAL**
- **Relevant personnel in Carlow County Development Partnership including Manager, Rural Development Officer and TÚS Supervisors**
 - **CEO and President County Carlow Chamber of Commerce, Industry and Tourism**
 - **President of Carlow College**
 - **Vice-President, Carlow IT, Development and Research**
 - **Glór Cheatharlach**
 - **Tourism Ireland**
 - » Finola O Mahony, Head of Europe Tourism Ireland – Acting German Market Manager
 - » Monica McLaverty, Manager Southern Europe
 - » Judith Cassidy, Deputy General Manager Great Britain
 - » Billy Condon, Vice President – USA & Canada
 - » David Boyce, Head of Middle East, Asia & Emerging Markets
 - **Fáilte Ireland - Fiona Moore, Carlow Programme Officer Ireland's Ancient East**
 - **National Historic properties within OPW (Frank Shalvey and Mary Heffernan)**
 - **Waterways Ireland**
 - **Tourism Officers from Wexford, Laois, Kildare, Wicklow & Kilkenny**
 - **Coillte**
 - **ITOA**
 - » Sue Uda, Owner of A Touch of Ireland
 - » Marina Finn, Chief Executive Abbey Group
 - » Dervla O Neill, Product Manager CIE Tours International
 - » Ann Marie Mahon, Product & Contracts Manager Brendan Vacations
 - » Helen Cole, Marketing Manager Vagabond Tours
 - **CTTC Kevin Traynor, National Director**

FAC would also like to thank the many members of the Carlow tourism trade for providing their time to discuss the development of and opportunities for tourism in Carlow.

APPENDIX 2

DOMESTIC MARKET SURVEY

To gauge perceptions of the domestic market to County Carlow as a destination an online survey was issued during July and November 2019 with 361 responses.

■ Responses

Have you visited County Carlow before?

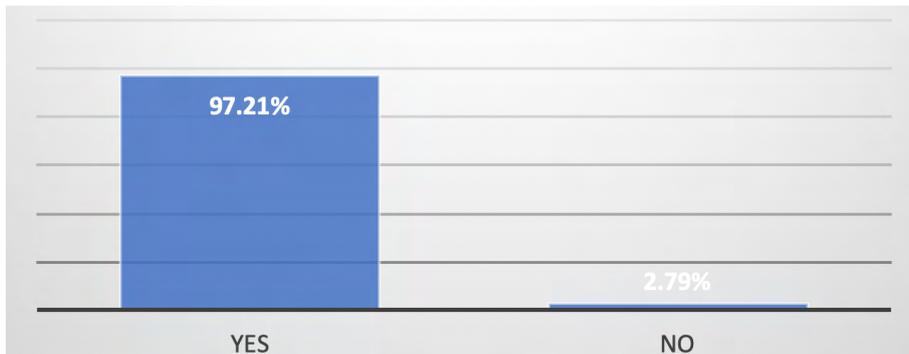


Figure 2-01 Have you visited County Carlow before?
Most respondents (97%) had visited County Carlow before.

When did you last visit County Carlow?

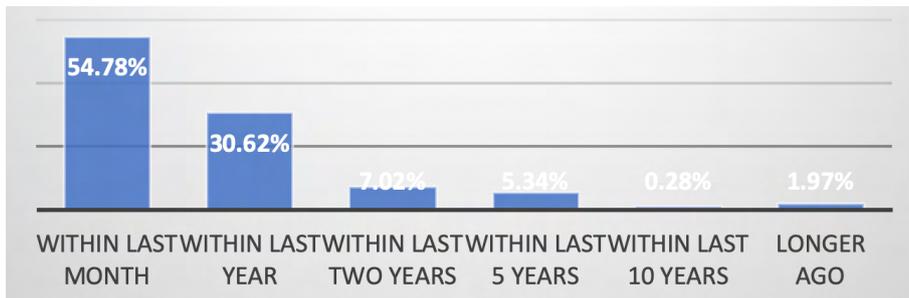


Figure 2-02 When did you last visit County Carlow?

When asked when they had last visited the county almost 55% said within the last month, a further 31% within the last year and just over 7% within the last two years. Less than 8% had visited more than five years ago.

If yes, which of the following visitor groups would you place yourself in?

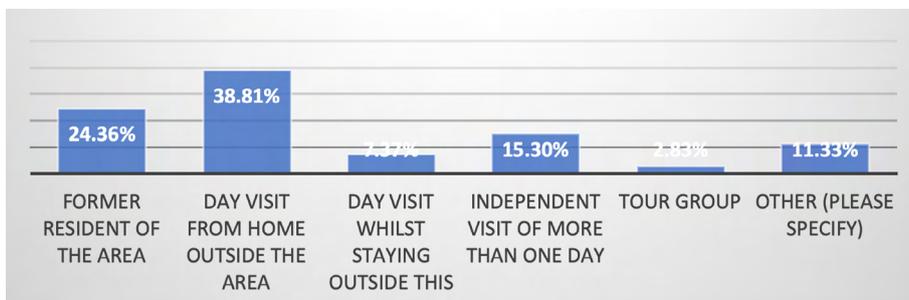


Figure 2-03 Which of the following visitor groups would you place yourself in?

When asked what type of visitor group they placed themselves in the most popular answer was 'day visit from home outside of the area' with 39% choosing this. This was followed by 'former resident of the area' (25%), 'independent visit of more than one day' (15%), and 'day visit while staying outside the area' (7%). Less than 3% had visited as part of a tour group. Of the 11% who indicated another type of visit, several answered that they were in Carlow for business with others there for weddings, visiting family or they worked in the county.

Are you aware of the tourism brand 'Carlow: Through the Waters of Time'?

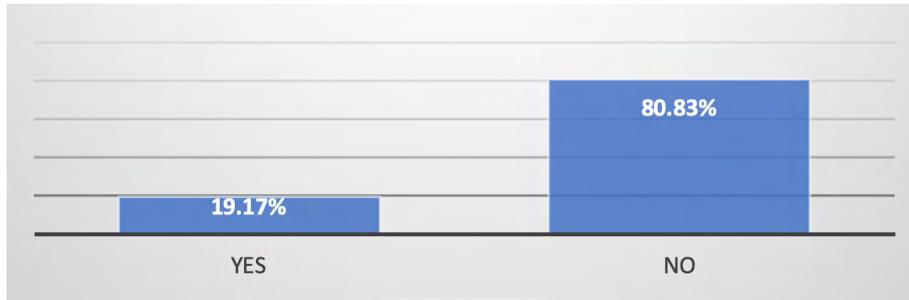


Figure 2-04 Are you aware of the tourism brand 'Carlow: Through the Waters of Time'?

There was very low awareness of the tourism brand 'Carlow: Through the Waters of Time' with 81% unaware of the brand.

If staying overnight, what was the main type of accommodation used?

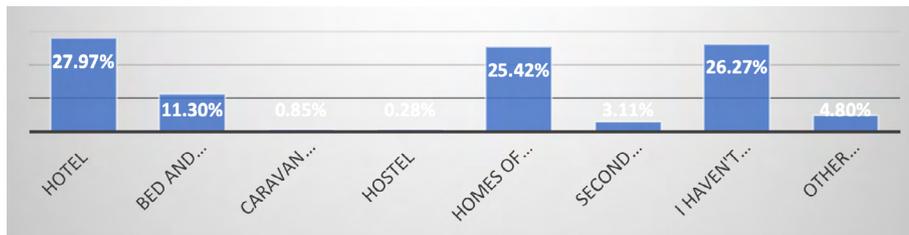


Figure 2-05 If staying overnight, what was the type of accommodation used?

When asked what accommodation they used most said **staying in a hotel** (28%), followed by **homes of friends and relatives** (25%), followed by B&B's/guesthouses (11%). Approximately 26% of those responding hadn't stayed in Carlow and just over 3% stayed in a second home. Of the 5% (17 respondents) that indicated 'other' most (11) were staying in their own home, indicating that some people answered the survey who were resident in the county, four of the remaining six were staying in AirBnB, with the other two staying with family.

How would you rate the quality of your accommodation?

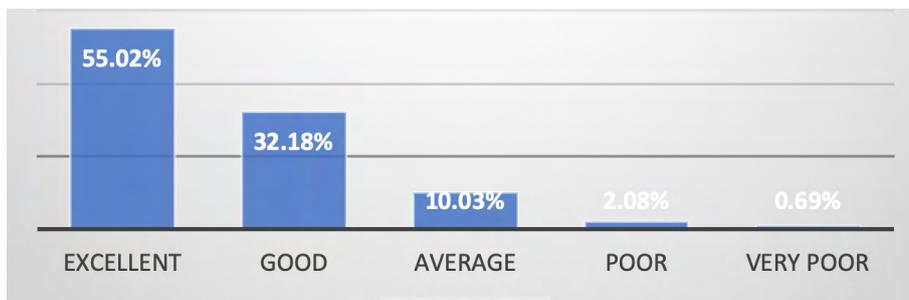


Figure 2-06 How would you rate the quality of your accommodation?

There is a vote of confidence for County Carlow's accommodation providers with **over half saying the quality of their accommodation was excellent** (55%) with a further 32% saying it was good. Only 3% said it was poor or very poor.

What was the main method of transport used to travel to Carlow?

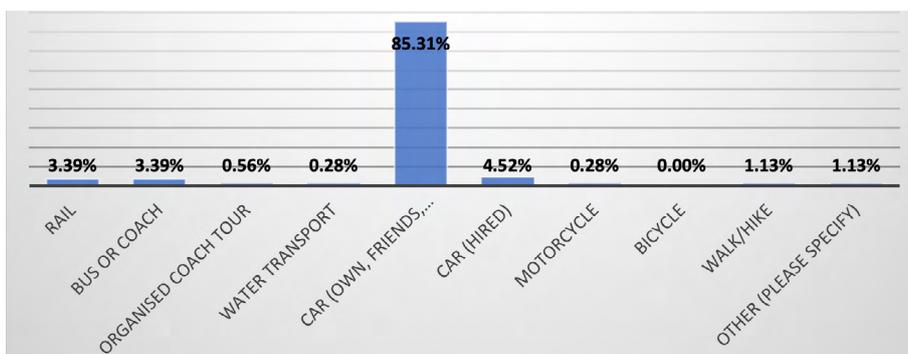


Figure 2-07 What was the main method of transport used to travel to Carlow?

By far the most popular mode of transport to **Carlow was by car (own, friends or company)** with 85%, followed by hire car (4.5%), bus/coach (3%) and rail (3%). Given the importance of the domestic market to the tourism sector, this re-emphasises the importance of a measured approach to the provision of a public bus service between hubs and visitor attractions. There may be an opportunity to leverage services such as Ring-a-link to provide a pilot service.

What was the main reason you wished to visit County Carlow?

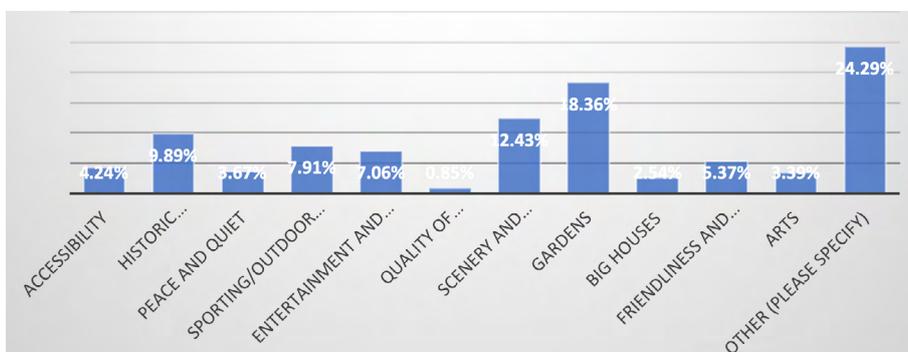


Figure 2-08 What was the main reason you wished to visit County Carlow?

When asked what was the main reason they wished to visit County Carlow the most popular answer specified was **gardens** (18%) followed by **scenery/countryside** (12%), **historic interest/attractions** (10%) **sporting/outdoor activities** (8%), **entertainment/recreation** (7%), as well as accessibility (4%) and peace and quiet (4%). Big houses came relatively low down with only 2.5% selecting this answer. This may reflect the **lack of market ready big houses attractions in the county**. A quarter of people (86 respondents) selected 'Other' for this question. By far the most popular answer specified was visiting friends and family (45), followed by shopping (8), a wedding (5), genealogy (4) and work/business (3). One person said the tearoom at Ducketts Grove, another the Borris Festival of Writing and Ideas, and one more that the reason they came was

“Family connections plus good reports from brand ambassadors Olivia O’Leary & Kathryn Thomas”.

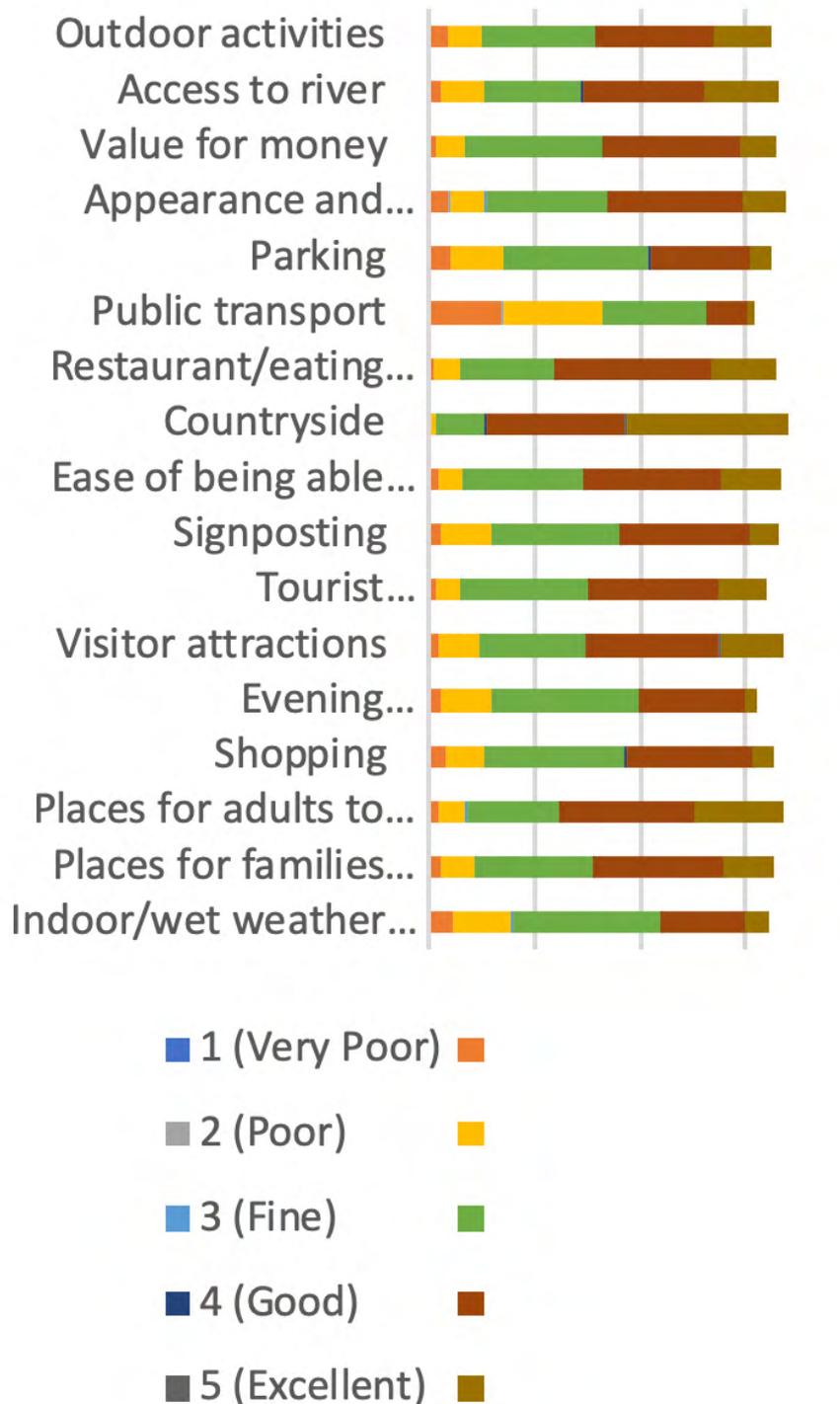
Visit _{Home} Visiting family Wedding Family
 Visiting relatives friends live Shopping

“I could pick all of the above. I love Carlow with all my heart”

When asked how they rated a range of features of Carlow as a tourism destination the aspects that visitors thought were ‘**very poor**’ and ‘**poor**’ included: **public transport** (53%), **indoor/wet weather facilities** (24%), parking (22%), **evening entertainment** (19%), signposting (18%), appearance and cleanliness (16%) and access to the river (16%).

Those features that they thought were ‘**Excellent**’ or ‘**Good**’ included: **Countryside** (85%), **restaurants/eating facilities** (64%), **place for adults to visit** (64%), **ease of being able to walk around** (57%), **access to the river** (57%) [perhaps indicating that visitors wish to visit the river for different purposes], visitor attractions (56%), outdoor activities (52%), tourist accommodation (53%), places for families to visit (53%).

There was also satisfaction with value for money (50%) and appearance and cleanliness (50%) though there is room for improvement.



APPENDIX 3

FUNDING OPPORTUNITIES

A range of current funding mechanisms which offer potential for tourism and recreation related projects are outlined in table A3-1.

Table A3-1 Current Funding Programmes

Funding Programme	Impact
The Rural Regeneration and Development Fund (RRDF)	Established under the National Development Plan. Used to support projects with a demonstrative positive impact on the sustainable economic and social development of rural Ireland.
Fáilte Ireland Capital Grant Funding	In recent years Fáilte Ireland have launched several funding schemes including Destination Towns (with Carlow Town successfully awarded €500,000 in 2019 for wayfinding and public realm works), Platforms for Growth, Grants Scheme for Large Tourism projects. Subject to Covid-19 budget related adjustments it could be expected that further funding schemes may be made available during the period of the strategy.
Town and Village Renewal Scheme	The Town and Village Renewal scheme aims to support rejuvenation of Ireland's rural towns and villages by providing grant support to projects that enhance their economic, tourism and social sectors. Funded by the Department of Rural and Community Development, the scheme is targeted at both towns and villages with a population of 5,000 people or less, and those with a population of 5,001 to 10,000 people. However, weight is given to smaller rural areas, and these areas receive 60% of total funding available. The scheme supports projects that will have a positive economic impact by way of supporting entrepreneurship or tourism initiatives or developing individual sectors within the area.
The LEADER Programme	The LEADER programme in County Carlow is administered through the Carlow Local Community Development Committee (LCDC) with tourism representing a key strand of their activities.
The Built Heritage Investment scheme (BHIS) / Historic Structures Scheme (HSF)	The Built Heritage Investment scheme was introduced in 2016 and provides funding for repair and conservation of protected heritage structures. The BHIS seeks to leverage private capital for investment in a significant number of labour intensive, small-scale conservation projects across the country.
The Outdoor Recreation Infrastructure Scheme	The Outdoor Recreation Infrastructure scheme, funded by the Department of Rural and Community Development, provides grant support for development and maintenance of outdoor amenities. By developing Greenways, Blueways and cycleways, as well as other types of recreational infrastructure, the scheme aims to encourage local community activity and attract tourism. Though not restricted to rural areas, most projects supported have occurred in rural areas across Ireland.
The Heritage Council	The Heritage Council supports a wide range of heritage projects through an annual grants programme. Grants may be suitable to small scale heritage conservation and research projects in County Carlow.

COUNTY CARLOW

Tourism Strategy and Action Plan 2020-2025



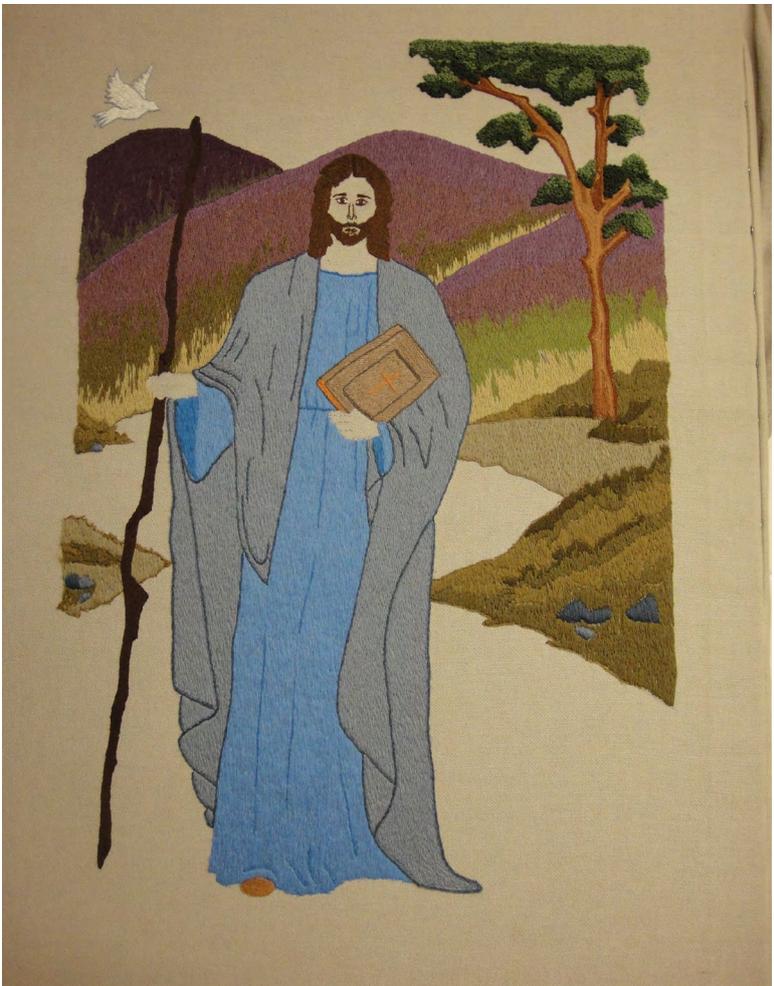
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