



Leitrim
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A growth strategy for tourism in Leitrim 2015-2021

January 2015

Executive Summary

Introduction

Relative to its potential to deliver economic growth and jobs, there are opportunities for tourism in Leitrim to perform better. The Draft Leitrim County Development Plan 2015-2021 states "... there are plenty of opportunities to double the size of the tourism sector in Leitrim". While this is ambitious, projected future growth is from a low base and is targeted from segments and markets where there is a clear fit between customer motivations and Leitrim's key selling points.

The county scores highly on many of the attributes that make a tourism destination successful but alongside the positives are several challenges. Trade and agencies are keen to see results, and together, must address the issues to drive sustainable future growth. A cornerstone of the strategy is the development of experiences that capitalise on Leitrim's strengths.

The strategy and action plan are modelled on research, consultation and best practice. The strategy will be driven by the Leitrim Tourism Growth Alliance (LTGA). To deliver it, trade and agencies need to adopt a united, cohesive approach in implementing the action plan. Success will not happen overnight and there will be challenges ahead. However, the opportunities are many and the potential is clear.

The current situation

Current tourism performance in Leitrim is estimated at 144,000 visitors who generate €34m of tourism revenue annually. This figure includes 39,000 international visitors (Fáilte Ireland data), 70,000 domestic visitors (estimate) and 35,000 visitors from Northern Ireland (estimate).

Source market	Visitors	% of total visitors	Revenue	% of total revenue	Source of data
Overseas	39,000	27%	€14m	40%	Fáilte Ireland
Domestic	70,000	49%	€13.5m ¹	40%	Estimate
Northern Ireland	35,000	24%	€6.7m ²	20%	Estimate
Estimated total	144,000		€34m³		

The majority of Leitrim's accommodation is in the south of the county. Accommodation is very limited in other parts of the county but as tourism grows, investors and accommodation providers will see business opportunities to fill gaps.

The Leitrim brand

Consumer research identifies Leitrim's key highlights as; friendly people, landscape/scenery, water (the Shannon, lakes, canals), family connections, culture and atmosphere/pace of life. The components of the Leitrim brand are:

¹ Based on Fáilte Ireland data of €193 average spend per domestic visitor in Ireland.

² Based on Fáilte Ireland data of €194 average spend per Northern Ireland visitor to Ireland.

³ It is likely that this estimate is conservative.

Brand promise: Memorable holiday experiences, friendly and authentic people, natural and scenic landscape

Brand values (who is Leitrim?): Memorable, friendly, warm, intriguing, proud of our heritage, proud of our unspoilt environment

Brand essence (core of Leitrim brand): Gracious, authentic

A brand story that encapsulates the Leitrim tourism experience has been copywritten. The 'elevator pitch' for the Leitrim Brand Story is:

"Ireland's unmissable masterpiece of nature, Leitrim's magnetic landscape draws you in with its gentle rolling hills, glens and more waterways than any other county in Ireland. Home to Ireland's first blueway, its array of activities – on water and on land – will engage and excite, while your soul will be stirred with Leitrim's fascinating heritage and culture, and vibrant arts scene. Its festivals and traditional music scene combine to make for a place of living heritage that beats with a modern heart. Exceptionally friendly locals create a truly memorable and authentic Irish holiday."

The model for growth

Tourism as an economic driver

Every €1mn of tourist expenditure helps to support 34 tourism jobs. Based on tourism revenue of approximately €34m from Leitrim's overseas, Northern Ireland and domestic visitors in 2013, tourism in Leitrim currently supports in the region of 1,200 jobs. Tourism is one of the county's most important economic sectors and has significant potential to play an important role in its economic future.

LTGA Vision: Leitrim is renowned as an authentic, friendly tourism destination. Compelling experiences, rooted in natural beauty, are delivered by people who are proud of their county's unique strengths.

LTGA Mission: Guided by the brand values, Leitrim Tourism Growth Alliance leads the delivery of this vision in collaboration with stakeholders. A customer-focused approach supports the development and promotion of tourism as a key economic driver for Leitrim.

2021 Targets

Targets have been set for tourism in Leitrim by 2021 from international, domestic and Northern Ireland visitors. This will double the size of the tourism sector.

2021 targets		
Tourist numbers	Tourism revenue	Jobs supported
296,000	€70m ⁴	2,400

The segments and markets that represent potential for Leitrim are summarised in the table.

Segment	Market			
	GB	US & Canada	Germany	Domestic & N I
Culturally Curious	Culturally Curious	Great Escapers	Connected Families	
Great Escapers	Irish Diaspora		Footloose Socialisers	
Irish Diaspora			Indulgent Romantics	

Anglers in the Dutch market will also be targeted.

⁴ In real terms, i.e. 2014 prices.

There is a close fit between the demands of the target segments and the tourism product in Leitrim. However, products in isolation will not deliver tourism growth. Products must be converted into memorable experiences that appeal to the target segments.

Centres of excellence

Centres of excellence based on Leitrim's strengths will be developed. In these centres of excellence, the brand promise will be consistently delivered because the core product and infrastructure are already in place or can quickly be put in place through enhancements and upgrades. Trade in centres of excellence have a clear understanding of and focus on their target segment; they develop and deliver experiences tailored to meet segment needs. Trade and agencies proactively collaborate with each other and with neighbouring counties, and both their collective and individual marketing and sales efforts are targeted and complementary.

Conclusion

The ambitious growth targets in tourism numbers and revenue as outlined are predicated on the strategic alignment of holiday experiences with the demands of the target segments. The strategy demands that compelling experiences are created around Leitrim's tourism product/infrastructural strengths as detailed in chapter 6. The conversion from experience development to delivering tourism numbers and revenue is founded on 6 strategic pillars as outlined below.

Strategic pillars

Pillar	Pillar goal (what success looks like)
Customer centricity	Our customer is at heart of everything. We understand what they want and everyone they meet on the journey (pre-visit to end of holiday) delivers a truly memorable experience.
Product & infrastructure	All investment decisions in product/infrastructure capitalise on, but protect, Leitrim's natural & built assets. We focus on developing assets that give Leitrim a lead within the county's competitive set.
Experience development	All areas of Leitrim deliver a unique holiday experience built on product, service and story. Cohesive commitment to experience development creates lasting memories that drive repeat & referral business.
Collaboration	Everyone involved in tourism in Leitrim, directly and indirectly, understands its economic importance. This understanding drives real collaboration, communication and sharing.
Marketing & sales	Cross-platform marketing communications inspire and influence partners and customers. Leitrim is easy to find in the places where customers search for information. We make it easy for them to decide and buy.
Governance & implementation	Delivery of the strategy is driven by a shared desire for success. Leitrim Tourism Growth Alliance (LTGA) and its various working groups lead and implement the strategy.

Customer centricity

A clear picture of the target customer underpins every decision from infrastructure and product investment, to experience development to collaboration, and sales and marketing.

Product & infrastructure

In line with national tourism policy, “capital investment in tourism will recognise the need for investment in both physical assets and in other areas that provide a lasting improvement in the overall quality of the visitor experience”. For Leitrim to create and deliver outstanding holiday experiences, it is essential that the product base on which holiday experiences are built is outstanding in its own right. The product base comprises

- Leitrim’s key selling points that are market-ready or near market-ready
- Leitrim’s key selling points with market leading potential
- Products that add value to key selling points

In the short to medium term, some tourism products will need capital investment in physical assets e.g. walkways, cycle paths, slipways, fishing pegs etc. Others are unlikely to need major capital investment in the short term (although over the life of this strategy, all products will require some level of capital for upgrades and repairs). All products and product owners/managers need investment in capacity building, networking, experience development and marketing.

	Product	Rationale	Investment in physical assets	Investment in other areas
Market-ready or near market-ready	Shannon Blueway	Aligned with Lakelands proposition	X	X
	Northern Glens Experience	Aligned with Wild Atlantic Way proposition	X	X
	Cruising	Aligned with Lakelands proposition	X	X
Market leading potential	Angling	Regain market leading status	X	X
	Walking	Capitalise on market demand	X	X
	Cycling	Capitalise on market demand	X	X
	Lough Rinn rowing facility	Secure market leading status	X	X
	Adventure Tourism	Capitalise on market demand		X
	Eco tourism	Regain market leading status		X
	Diaspora and genealogy	Capitalise on Diaspora potential		X
Add value to key selling points	Festivals and events	Adds value to key selling points		X
	Heritage and culture	Adds value to key selling points		X
	Business tourism	Adds value to key selling points		X
Other	Accommodation	Gaps in supply in parts of the county	X	X

Public investment in infrastructure and facilities will create opportunities for private sector investment. For example, growing visitor numbers to the Northern Glens experience will spur investment by the private sector in accommodation in the area, growing use of the Blueway will encourage additional or increased capacity in activity providers to cater for customer demand.

Experience development

The strategy for growth is founded on the development of compelling, memorable experiences. Such experiences are built on product excellence, story and service. They are closely aligned to the needs of the target segments. A programme of experience development with trade and stakeholders will bring many of Leitrim's products to a market-ready position and all experiences will be underpinned by a commitment to customer centricity, capacity building and collaboration.

Collaboration

A collaborative approach will be built on leadership from the Leitrim Tourism Growth Alliance, and communication between stakeholders will generate trust in working towards a common goal. Working with stakeholders in neighbouring counties will also be important.

Sales and marketing

Strategic marketing partnerships between trade and agencies/public bodies are imperative to drive growth. For the domestic market, such partnerships will include the trade working with agencies and public bodies who play a role in implementing and delivering the strategy e.g. Leitrim County Council, Leitrim Tourism Ltd, Fáilte Ireland, Waterways Ireland, Inland Fisheries Ireland, Coillte, National Parks and Wildlife Service, Ireland West Airport Knock as well as local authorities in neighbouring counties. At an international level, strategic marketing partnerships must be forged with Tourism Ireland, inbound and market-based tour operators, international journalists and social media content generators.

As with experience development, marketing communications must be tailored to the demands of the target segments. Marketing communications will include digital platforms, print material, relationship building with tour operators, PR, trade and consumer promotions. Given that 80% of international visitors to Ireland use direct channels, the focus will be on maximising direct channels while also working with niche tour operators. KPIs will be set for each promotional activity and outcomes measured to guide future decision making. The current dearth in market research data will be addressed through an increased emphasis on the importance of collecting and using data about the market and the customer.

Governance and structure

The structure to deliver the strategy will comprise the Leitrim Tourism Growth Alliance and working groups. Underneath the working groups, various activation teams or project teams will be established at appropriate stages to deliver on specific marketing or product development projects.

Priority actions for 2015

Priority actions for 2015 include the following (full details with key actors and KPIs in chapter 11):

<p>Capacity building, networking and collaboration</p>	<ul style="list-style-type: none"> • Training for trade in customer care, experience development, delivering the brand promise, networking, collaboration, marketing, sales, innovation, customer research • Facilitate trade networking events and discovery days • Implement a local PR campaign to launch the strategy • Communicate economic impact of tourism for Leitrim through local PR campaign • Develop tourism ambassador programme for locals
<p>Product and experience development</p>	<p>Blueway</p> <ul style="list-style-type: none"> • Expedite completion of Blueway <p>Northern Glens</p> <ul style="list-style-type: none"> • Identify value added experiences to optimise potential; prioritise Wild Atlantic Salmon • Invest in way-finding and interpretive signage <p>Cruising</p> <ul style="list-style-type: none"> • Aggressively target German market with cruise hire companies, overseas tour operators and Ireland West Airport Knock (depending on flight schedule) <p>Angling</p> <ul style="list-style-type: none"> • Implement angling actions from Leitrim Recreation Strategy • Prioritise investment based on IFI National Angling Development Plan recommendations • Identify and develop high profile angling competitions <p>Walking</p> <ul style="list-style-type: none"> • Implement walking actions from Leitrim Recreation Strategy • Progress work on feasibility and screening studies for rail to trail projects <p>Cycling</p> <ul style="list-style-type: none"> • Implement cycling actions from Leitrim Recreation Strategy • Ensure multi use trails include off road cycle paths • Identify critical gaps in the Kingfisher Cycle Trail <p>Lough Rinn Rowing Facility</p> <ul style="list-style-type: none"> • Formalise arrangements for operations, management and promotion <p>Adventure</p> <ul style="list-style-type: none"> • Implement adventure tourism actions from Leitrim Recreation Strategy • Support new and existing adventure businesses <p>Eco tourism</p> <ul style="list-style-type: none"> • Commence review to identify any gaps in current offering <p>Diaspora and genealogy</p> <ul style="list-style-type: none"> • Stress test resources of Leitrim Genealogy Centre to be able to meet increased demand • Support local communities to harvest and harness local stories <p>Festivals and events</p> <ul style="list-style-type: none"> • Identify 2-3 festivals with potential to become flagship events of scale <p>Heritage and culture</p> <ul style="list-style-type: none"> • Support timed heritage and culture projects; prioritise 2016 commemorations • Develop arts experiences to bring arts assets to life <p>Accommodation</p> <ul style="list-style-type: none"> • Encourage participation in Fáilte Ireland approvals programme • Explore market intervention to encourage accommodation in north Leitrim

Marketing and sales	<ul style="list-style-type: none">• Make decision on whether to refresh brand identity (logo)• Integrate brand identity across all marketing• Provide trade with guidelines for use of brand identity• Develop central image, video and marketing message library• Prioritise website development with integrated SEO and Social Media strategy• Develop programme to upgrade trade websites• Continue strategic partnership with Ireland West Airport Knock• Manage effective relationships with marketing offices in key agencies around Lakelands and Wild Atlantic Way• Implement domestic consumer PR campaign• Develop overseas PR campaign with Tourism Ireland• Relationship building with trade partners at destination and individual operator level• Implement annual market research programme
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1. Setting the Scene

1.1 Introduction

Relative to its potential to deliver economic growth and jobs, there are opportunities for tourism in Leitrim to perform better. The Draft Leitrim County Development Plan 2015-2021 states "... there are plenty of opportunities to double the size of the tourism sector in Leitrim". While this is an ambitious target, the projected growth is from a low base. A collaborative approach to implementing the strategy and action plan will be required to achieve the ambition.

The county scores highly on many of the attributes that make a tourism destination successful. These include beautiful landscape (that is quite different to other areas of Ireland), numerous lakes, rivers and canals, attractive small towns and villages, innate friendliness, festivals and events, quality accommodation¹, activities, heritage and culture, and enthusiastic tourism stakeholders.

Alongside the positives are several challenges. Trade and agencies are keen to see results, and together, must address the issues to drive sustainable future growth. A collaborative approach built on trust and respect must be developed. A cornerstone of the strategy is the development of experiences that capitalise on Leitrim's core strengths.

Time and again during research for this strategy people talked about Leitrim being a "hidden gem". Remaining a hidden gem will not deliver for Leitrim; the county needs to actively pursue growth by increasing cooperation and collaboration, by building experiences that deliver what the customer is looking for, by always focusing on the customer's motivations and needs, and by being visible in the communication channels where today's tourist searches for holiday information.

The strategy and action plan presented in this document are modelled on research, consultation and best practice. The strategy will be driven by the Leitrim Tourism Growth Alliance (LTGA). To deliver the strategy, the trade and agencies need to adopt a united, cohesive approach in implementing the action plan. Success will not happen overnight and there will be challenges ahead. However, the opportunities are many and the potential is clear.

1.2 Terms of reference

The brief from Leitrim County Council and Leitrim Tourism Ltd outlined the key requirements:

"To prepare a strategy and action plan for the further development of the Leitrim Tourism product and service and for the marketing of the county as a tourist destination over the next six years."

1.3 Methodology²

Desk research

The following reports in particular inform the strategy:

- *Baseline analysis and recommendations for the future of the tourism sector in Leitrim*, Leitrim Development Company, 2012 (hereafter referred to as the Baseline Study)
- *Draft Leitrim County Development Plan 2015-2021*, Leitrim County Council, January 2014
- *Draft National Tourism Policy for Ireland*, Department of Transport, Tourism and Sport, July 2014
- *Leitrim Recreation Strategy*, Leitrim Development Company, 2014 (hereafter referred to as the Recreation Strategy)

¹ Accommodation supply is very limited in parts of the county.

² See appendix for full list of meetings, consultation and reports.

Consultation

The following consultation was undertaken:

- Meetings with Leitrim Tourism Growth Alliance
- Meeting with Leitrim Recreation Forum
- Focus groups with tourism trade (Ballinamore, Carrick on Shannon and Manorhamilton)
- Workshop with Leitrim Tourism Network
- One to one meetings with key stakeholders
- Consumer survey with 200 respondents (online and face-to-face)
- Two consumer focus groups (Dublin and Galway)
- Written submissions were also received

1.4 Key findings from desk research and consultation

Key findings from desk research and consultation are summarised as follows:

Opportunities and highlights	Issues and challenges
<ul style="list-style-type: none"> • Enthusiasm among the trade and agencies • Two of the four Fáilte Ireland strategic propositions: Lakelands & Wild Atlantic Way • Ireland's first inland Blueway • Rowing facility at Lough Rinn • Angling • Unspoilt, scenic countryside • Lakes, rivers, canals - water-based activities • Relaxation - health and wellbeing, yoga • Eco tourism • Culture, music, festivals, the arts • Land-based activities, walking, cycling • Proposed Greenway developments • Famous sons/daughters e.g. Seán MacDiarmada • Genuine hospitality • Pace of life • Very accessible to Dublin • Spare capacity in current accommodation³ stock • 5 international airports within a 3 hour drive • Growing schedule of flights into Ireland West Airport • Diaspora - genealogy and tracing ancestors • Ideal base for touring Northern Ireland, Wild Atlantic Way and Lakelands 	<ul style="list-style-type: none"> • Reliance on domestic market, much of it for weddings/occasions • Signposting, way finding and landscape interpretation • Association with hen and stag parties • Lack of accommodation in some areas • Low engagement with Fáilte Ireland approval system • Perception of 'North Leitrim/South Leitrim' divide • Insufficient familiarisation among local businesses • Sub optimal communication between stakeholders leading to a sense of distrust • Need for more family friendly activities and infrastructure to support family friendly outdoor activities • Poor online presence; www.enjoyleitrim.com not as good as it needs to be • Inadequate online presence for some tourism businesses • Uncertainty about future structures and governance • Consultation fatigue • Some tourism businesses are 'passive' in their approach to business and have failed to keep up with changes in consumer behaviour and market trends

This strategy and action plan set out what needs to be done to capitalise on opportunities and address challenges.

³ Note: accommodation is concentrated in certain areas and very limited in others.

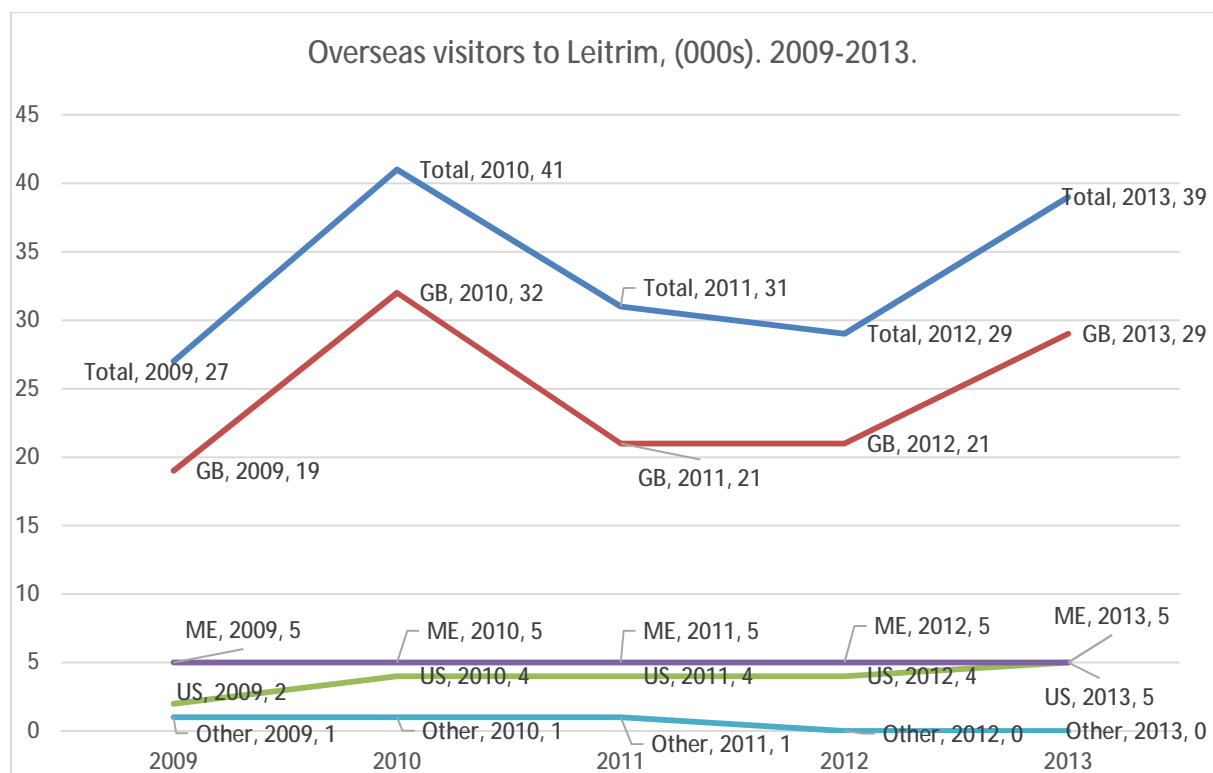
2. Current Tourism Performance

2.1 International visitors to Leitrim

CSO/Fáilte Ireland data shows that in 2013, Leitrim received 39,000⁴ international visitors, exceeding only Roscommon (35,000), Offaly (37,000) and Longford (22,000).

Great Britain (GB) accounts for three quarters of this number with the balance coming from Mainland Europe (ME) (5,000) and North America (NA) (also 5,000). Of the 5,000 European visitors, it is reasonable to assume⁵ that Germany and France are the main markets, with Germany (and German-speaking Austria and Switzerland), significantly dominant over France given the interest in inland cruising and the fit between the motivations of German holidaymakers and the Leitrim holiday experience. The North American market was just 2,000 visitors in 2009, but grew to 4,000 in 2010, 2011 and 2012 and to 5,000 in 2013. It is likely that VFR⁶/Diaspora is the main type of business from GB and US given Leitrim's high emigration levels in the past, although there are no data to support this. The Gathering in 2013 is the likely cause of the increase in US visitors from 4,000 to 5,000.

International tourism revenue to Leitrim in 2013 was circa €14 million; €10m from GB, €2m from Mainland Europe and €1m from US visitors.



Source: Fáilte Ireland 2014

⁴ Spent at least one night in Leitrim.

⁵ Germany and France are Europe's biggest markets to Ireland. A breakdown of mainland Europe visitors at a county level is not available.

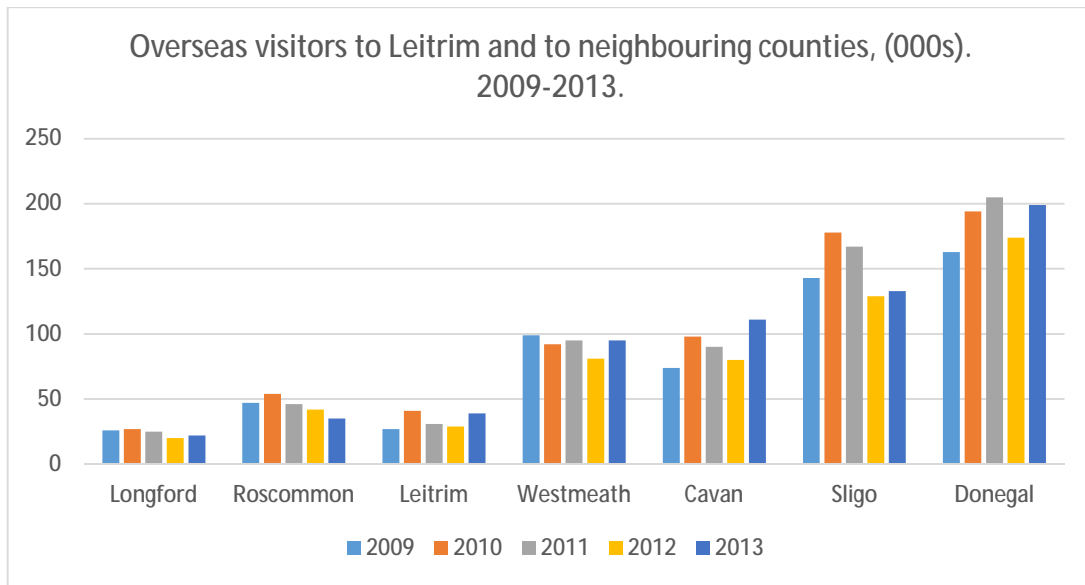
⁶ VFR = Visiting friends and relations.

Purpose of visit

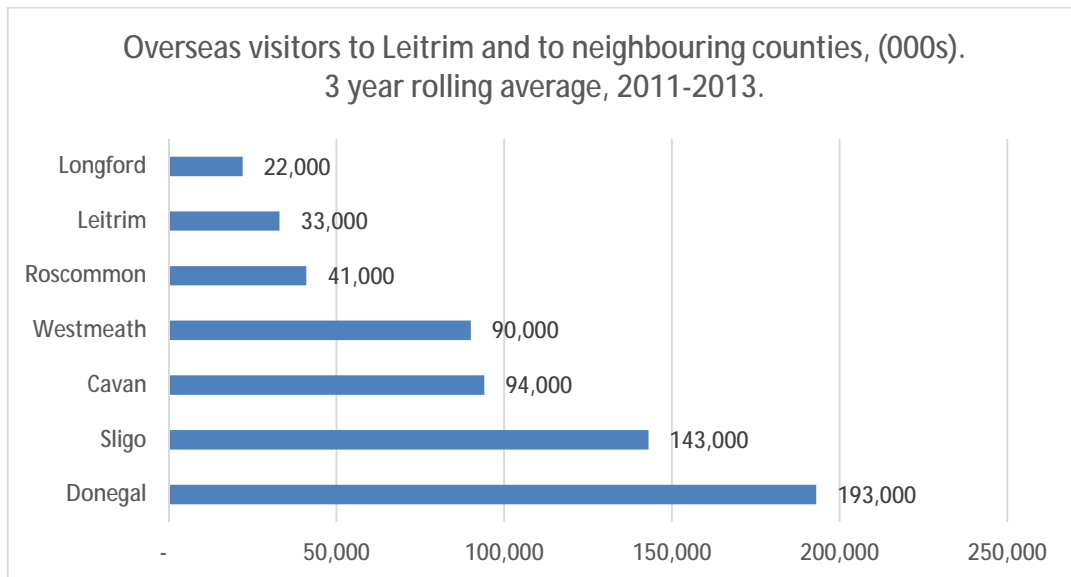
At a national level, of the 6.7 million overseas visitors to Ireland in 2013, 47% came for a holiday, 31% were VFR, 16% were here for business and 5% for other reasons. There is no similar breakdown available on purpose of visit for the 39,000 overseas visitors to Leitrim, but it is likely that VFR is a larger portion than the national average, and that international business is considerably smaller.

Comparison with neighbouring counties

Statistics at a regional or county level can be unreliable as small sample sizes can lead to sampling error. With this caveat in mind, it is still useful to look at Leitrim's performance compared to neighbouring counties. A three year rolling average is also presented.



Source: Fáilte Ireland 2014



Source: Fáilte Ireland 2014

2.2 Domestic trips to Leitrim

Since 2013, Fáilte Ireland publishes data for domestic trips at a county level, but where the number of trips is below 150,000, neighbouring counties are combined. In 2013, Cavan and Leitrim had a combined 192,000 domestic trips. Although there are no published data specifically on the size of Leitrim's domestic market, it is important to estimate its size in order to have a baseline from which to set targets and monitor future growth. Using available data, the consultants estimate that Leitrim's domestic market is circa. 70,000 trips annually.

Assumptions that inform the estimate of circa. 70,000 domestic trips

1. Assumption that there is a correlation between accommodation stock and visitor numbers
2. Assumption that Cavan and Leitrim have similar occupancy⁷ rates

Total domestic trips to Cavan and Leitrim in 2013	192,000	
Estimated share to each county (Based on correlation between accommodation stock and visitor numbers)	Leitrim	Cavan
	70,000	122,000
Basis of estimation:	Leitrim	Cavan
Accommodation capacity 2013		
Hotel, guesthouse and B&B rooms	374	991
<i>% of combined stock (1,365)</i>	<i>27%</i>	<i>73%</i>
Caravan & camping pitches and self catering units (individual & group)	74	98
<i>% of combined stock (172)</i>	<i>43%</i>	<i>57%</i>
Average share of overall accommodation capacity	35%	65%

Source: Consultant's estimate based on Fáilte Ireland data. Figures are rounded.

3. Anecdotal evidence that circa. 80% of Leitrim's hotel bednights are domestic. Weddings/events and hen/stag weekends are a big part of this although data are not available to quantify size
4. The Baseline Study's survey with accommodation⁸ providers showed that the domestic market accounted for 65% of bednights (80% for hotels)
5. The Fáilte Ireland Hotel Review 2012 showed that 54% of hotel bednights in the North West⁹ region are domestic

⁷ Hotel room occupancy in the North West Region was 53% in 2012. Source: Fáilte Ireland Hotel Review 2012.

⁸ The survey received a response from 7 accommodation providers, (3 hotels, 3 B&Bs, 1 self catering). Therefore, data need to be read with the small sample size in mind. Among the 3 hotels who responded, the domestic market accounted for 80% of bednights.

⁹ North West Region = Donegal, Sligo, Leitrim, Cavan and Monaghan.

2.3 Northern Ireland visitors to Leitrim

Fáilte Ireland data shows that there were 1.6 million visitors from Northern Ireland to the Republic in 2013. Although a breakdown of this data is not usually published, a special analysis was provided by Fáilte Ireland to assist with the development of this strategy. This analysis shows that of the 1.6 million visits in 2013, 596,000 were to the north west region. Of this, the consultants estimate circa. 35,000 Northern Ireland visitors to Leitrim.

Assumptions that inform the estimate of circa. 35,000 Northern Ireland visitors

1. Assumption that there is a correlation between accommodation stock and visitor numbers
2. Looking at accommodation capacity in the north west region, Leitrim has a 6% share of capacity across all accommodation categories. Six percent of 596,000 is approximately 35,000

Total Northern Ireland visitors to north west region in 2013	596,000				
Estimated share to each county	Leitrim	Cavan	Donegal	Sligo	Monaghan
(Based on correlation between accommodation stock and visitor numbers)	35,000	65,000	310,000	160,000	20,000
% share of total	6%	11%	52%	27%	4%
Basis of estimation:					
Accommodation capacity 2013	Leitrim	Cavan	Donegal	Sligo	Monaghan
Hotel, guesthouse and B&B rooms	374	991	3,337	1,330	417
% of combined stock (6,449)	6%	15%	52%	21%	6%
Caravan & camping pitches and self catering units (individual & group)	74	98	598	361	36
% of combined stock (1,167)	6%	8%	51%	31%	3%
Average share of overall regional accommodation capacity	6%	11%	52%	27%	4%

Source: Consultant's estimate based on Fáilte Ireland data. Figures are rounded.

3. The Fáilte Ireland Hotel Review 2012 shows that while Northern Ireland accounts for just 4% of hotel bednights nationally, it accounts for 26% of hotel bednights in the north west region

2.4 Total estimated tourism to Leitrim

Using the above estimates as a baseline against which to measure future growth, the estimated current position in Leitrim is:

Source market	Visitors	% of total visitors	Revenue	% of total revenue	Source of data
Overseas	39,000	27%	€14m	40%	Fáilte Ireland
Domestic	70,000	49%	€13.5m ¹⁰	40%	Estimate
Northern Ireland	35,000	24%	€6.7m ¹¹	20%	Estimate
Estimated total	144,000		€34m¹²		

¹⁰ Based on Fáilte Ireland data of €193 average spend per domestic visitor in Ireland.

¹¹ Based on Fáilte Ireland data of €194 average spend per Northern Ireland visitor to Ireland.

¹² It is likely that this estimate is conservative.

2.5 Accommodation stock

In 2013, Leitrim's registered and approved accommodation stock was:

	#
4* hotel rooms	90
3* hotel rooms	137
2* hotel rooms	36
Guesthouse rooms	61
B&B rooms	50
Total serviced accommodation rooms	374

Source: Fáilte Ireland 2013






Caravan & campsite pitches	20
Listed self-catering units	30
Group registered self-catering units	24

Source: Fáilte Ireland 2013

1. The majority of Leitrim's accommodation is in the south of the county. In trade focus groups, accommodation providers indicated that there is spare capacity within the current supply base in the south of the county. Accommodation is very limited in other parts of the county but as tourism grows, investors and accommodation providers will see business opportunities to fill gaps
2. The Baseline Audit identified a total of 184 accommodation providers, ranging from hotels to individual self-catering properties. Just 31% were registered or approved with Fáilte Ireland. Of the 68 B&Bs, just 17 are approved
3. Leitrim's seven hotels account for 70% of the county's serviced approved rooms

2.6 Car use by international and domestic tourists

Poor public transport in rural areas is sometimes cited as a barrier to tourism growth. It was mentioned in both trade and consumer research undertaken for this strategy. Most tourists on a city break do not expect to use a car. Most tourists to rural areas do. In Ireland's four main overseas markets, just 31% of holidaymakers to Dublin use a car while the figure for the north west region is 68% (nationally, it's 58%). For the domestic market, poor public transport in rural areas is not a barrier to tourism growth as car ownership is very high at 2.5m cars, and rural taxi and hackney services have expanded in recent years.

Holidaymakers	 GB	 US	 Germany	 France	 Ireland
Car hired	20%	46%	32%	37%	2.5m cars in Ireland
Car brought	20%	n/a	23%	18%	
Overall use of car	40%	46%	55%	55%	

Source: Fáilte Ireland, 2013

What does this mean for Leitrim? There is a large market of people who either hire or bring their car. Most Culturally Curious¹³ visitors from London, Great Escapers from Berlin, or Footloose Socialisers from Dublin expect to use a car when holidaying in a rural destination as they want to explore and immerse themselves in the local area. Future focus will be on what Leitrim can do to attract more of these tourists. That does not mean that efforts (lobbying, case making etc.) to improve rural transport should not be made; but lack of rural public transport is not a barrier to growing tourism in Leitrim – there are lots of other opportunities to focus on first.

¹³ The customer segments are explained in chapter 5.

3. Brand Review

3.1 Brand review brief

A brand is often defined as the promise made to the customer, followed by the experience delivered to the customer, followed by the lasting memory, after engaging with the brand. A logo is a physical manifestation of a brand. A key element of successful brands is that the customer interaction with the brand and the delivery of the brand promise are always consistent.

The brief asked the consultants to

“Review the current brand of Leitrim tourism and develop proposals to strengthen this brand in order to improve the ability of the brand to compete.”

3.2 Methodology


The methodology included:

1. Desk research
2. Survey with 200 consumers; online survey and face to face with visitors to Carrick on Shannon tourist office
3. Two consumer focus groups; one in Dublin, one in Galway

3.3 Research insights

Key insights from the research:

- Leitrim’s key **highlights** are; friendly people, landscape/scenery, water (the Shannon, lakes, canals), family connections, culture and atmosphere/pace of life
- Across both forms of consumer research, there is very little awareness of the **brand identity**, i.e. the ‘Leitrim - Explore, Experience, Enjoy’ logo and tagline
- Consumers identified the following **weaknesses with the current website**: too much text, too many listings, not enough imagery or messages about luxury, food, cosy pubs, friendly people, family activities, not enough ‘warmth’, not enough about the arts, crafts, organic/eco, too ‘outdoorsy’, it doesn’t tell a story. People expressed surprise at the use of images of the sea – they do not associate Leitrim with the sea; lakes and rivers yes, but not the sea
- **Logo**: Most people in the online and face-to-face surveys said that they liked the logo. However, when asked to elaborate, comments were fairly evenly split between those who liked it and those who felt that, overall, it didn’t do justice to the Leitrim promise. In the focus group research comments were considerably more negative than positive
- When shown the **tagline**, comments (in the online and face to face surveys, and in focus groups) were positive

		J	K	L
Logo		64%	28%	6%
Tagline: <i>Explore, Experience, Enjoy</i>		67%	26%	7%

Source: Online and face to face quantitative research

Positive comments about the logo	Negative comments about the logo
<ul style="list-style-type: none">• "Catchy and colourful"• "Clear, but somewhat unimaginative – it's just ordinary lettering more than a logo"• "Good colours: Green = natural, purple = historic"• "I like the colours and I think the 3 word tagline is clever"• "It is simple. I like that it's not loud and in your face, like Leitrim"	<ul style="list-style-type: none">• "A bit bland. Does not stand out"• "Adequate"• "Bit bland, and it should add a picture to the logo"• "Could have a little more punch"• "Does not grab your attention"• "I don't like the heart"

Source: Focus groups and quantitative research

The following comment from the consumer focus group in Galway is a good reflection of overall consumer thinking towards promoting a county in the domestic market:

"When you are advertising you can make the name of the county a lot smaller, I don't know the name of the county, I don't need to know the name, but I am interested in what is really unique or what there is to do, so highlight that."

Highlights of people's trip to Leitrim



Source: Consumer survey

Trip highlights - quotes from consumer research

"The absolutely beautiful countryside, friendly people, delicious food and seeing where my paternal grandfather was from"

"Views in North Leitrim - Lough Gill - proposed to my girlfriend there"

"The whole experience really. The friendliness of the people, the beautiful countryside & the cultural events at the Dock & Corn Mill Theatres. Traditional music night at the Thatched Pub was also fun"

"My children's delight at attending lough Allen Adventure centre"

"There is a lot of water, and lovely places to eat. A lovely country atmosphere. Just a lovely place, people were lovely, pubs were lovely. Some fabulous lakes"

"Watersports on Lough Allen - great fun. Finding the old remains of the cottage where my dad's relatives came from - was pretty beautiful"

"Sitting on the stone wall near the old abbey in Dromahair on a Sunday morning eating hot scones from the grocer. I could feel my grandda sitting next to me pointing out the sites of his childhood. Also the church ruins in Killanummery on the 131st wedding anniversary of my great grandparents"

"Being brought fishing by a local we met - was very kind and we had a great time"

"Carrick on Shannon is great for hens and stags. You don't have to organise anything, it's all there for you"

"Friendliness of the people, excellent quality of roads, well signposted, easy to get around by car"

Source: Consumer survey and focus groups

3.4 The Leitrim Brand

A number of components are typically used to define a brand. For Leitrim, these are:

Brand essence (core of Leitrim brand):	Gracious, authentic
Brand values (who is Leitrim?):	Memorable, friendly, warm, intriguing, proud of our heritage, proud of our unspoilt environment
Brand promise:	Memorable holiday experiences, friendly and authentic people, natural and scenic landscape

It is useful to describe a brand in an elevator pitch and in a fuller brand story.

The Leitrim Brand Story

Ireland's unmissable masterpiece of nature! A magnificent palette of canals, lakes, rivers, and gentle rolling hills and glens unlike anywhere else. An historic place of living culture that beats with a modern, vibrant heart. A magical place that stirs your spirit and nurtures your soul. A place where genuine hospitality and friendly people are simply part of the DNA. Welcome to Leitrim.

If you like the water, you'll love Leitrim. Whether it's a cruise on the Shannon, a barge on the canals, angling, kayaking or windsurfing, Leitrim will captivate, excite and exhilarate you.

Leitrim's unique landscapes and stunning scenery offer a real escape from life's hustle and bustle, with incredible panoramic views, and silent, peaceful surroundings that can be enjoyed by car, by bicycle, by canoe or on foot.

Leitrim boasts Ireland's first inland Blueway: an inviting network of water, walking and cycle trails which you can experience as you weave your way through towns and villages in this intriguing landscape.

Leitrim nurtures your spirit with its tranquillity and gentle pace of life, a tranquillity that is matched by a vibrant arts culture. Whether you're a fan of music, painting, literature, design or crafts, Leitrim has soul-stirring experiences for you. Watch artists innovate in their studios, listen to their stories and get connected to the creative process. You'll also be enthralled by Leitrim's traditional Irish music and you'll find lively music sessions in many pubs throughout the county.

Festivals are a terrific way of meeting people and sharing the fun, and Leitrim is renowned for its festivals which feature arts, music, drama and local specialities. The unique Roots Festival invites descendants of Leitrim to renew their connection with their home county. If you're exploring your historical links, the Leitrim Genealogy Centre can help you to trace your ancestry.

The true character of Leitrim emanates from her people - the most genuine people you'll meet in Ireland, acclaimed for an extra-special friendliness and hospitality. Whether you need directions or a recommendation for something to do, gracious locals will go the extra mile to help.

As you go deeper into this fascinating region, linger at the waterside pubs and restaurants, treating yourself to glorious local cuisine. Enjoy the outstanding natural beauty of Lough Allen or learn about the history of the railway, canal, lakes, iron and coal mining through the Sliabh an Iarainn Visitor Centre. Eco-breaks, whether to learn about local conservation or a yoga retreat will help rediscover your inner calm.

Situated in the north-west of Ireland, Leitrim is easily accessible by road, sea and air. Once you're here, if travelling by car, you can choose from a range of driving routes to ensure that you experience the best that the county has to offer. Wherever you stop along the way, you can luxuriate in delightful accommodation including stylish hotels, family run guesthouses and B&Bs, self catering houses or glamping. All serviced with the personal touch.

For the ultimate authentic Irish experience, come and visit Leitrim!

Elevator pitch

Ireland's unmissable masterpiece of nature, Leitrim's magnetic landscape draws you in with its gentle rolling hills and glens and more waterways than any other county in Ireland. Home to Ireland's first blueway, its array of activities – on water and on land – will engage and excite, while your soul will be stirred with Leitrim's fascinating heritage and culture, and vibrant arts scene. Its festivals and traditional music scene combine to make for a place of living heritage that beats with a modern heart. Exceptionally friendly locals create a truly memorable and authentic Irish holiday.

Note: Stakeholders should include elements of the Leitrim Brand Story in their own brand story and marketing communications, and be true to the Leitrim Brand when delivering the promise on the ground.

3.5 Recommendations about brand identity (the logo)

1. In the context of the imminent development of the new website, there is an opportunity to tweak the logo (the brand identity) to accurately reflect the Leitrim tourism experience. The marketing working group will make a decision on this
2. In consumer research, there was criticism about the heart in the logo; it jars with the positioning of Leitrim as an authentic, real place with genuinely friendly people. This can be considered by the marketing working group
3. The tagline, 'Explore, Experience, Enjoy' tested well in qualitative consumer research so it should remain and be fully incorporated into the logo. The logo and tagline should always be used together
4. The brand identity should be fully integrated with all marketing communications, both trade and consumer communications
5. Guidelines should be developed for appropriate use of the brand identity by the trade and they should be encouraged to use it in their own promotional activities. This should result in higher awareness of the brand identity in future consumer research
6. To deliver consistent messaging, a central library of images, video and marketing messages should be compiled and made available to trade and partners such as tour operators and media

In conclusion; the most important thing is that the brand promise and experience are delivered on the ground. Thereafter, the brand identity (logo) will work best when the trade incorporate it to their own promotional activities through use of the logo, imagery, stories, and overall look and feel.

4. The Model for Growth

4.1 The importance of tourism

There are significant economic benefits associated with tourism. Fáilte Ireland states that “Because tourism is characterised by the fact that consumption takes place where the service is available and tourism activity is frequently concentrated in areas which lack an intensive industry base, it is credited with having a significant regional distributive effect.”

The National Tourism Policy states that “Tourism’s contribution is not confined to directly generating employment, economic activity and exports. It also contributes by encouraging social inclusion and access to the labour market.”

Every €1m of tourist expenditure helps to support 34 tourism jobs. Based on tourism revenue of approximately €34m from Leitrim’s overseas, Northern Ireland and domestic visitors in 2013, tourism in Leitrim currently supports in the region of 1,200¹⁴ jobs. Over the lifetime of the strategy, the LTGA and its trade members will prioritise the accurate measurement of tourism jobs created and sustained.

It is clear that tourism is one of Leitrim’s most important economic sectors and it has significant potential to play an even greater role in the future.

4.2 Vision

Leitrim is renowned as an authentic, friendly tourism destination. Compelling experiences, rooted in natural beauty, are delivered by people who are proud of their county’s unique strengths.

4.3 Mission

Guided by the brand values, Leitrim Tourism Growth Alliance leads the delivery of this vision in collaboration with stakeholders. A customer-focused approach supports the development and promotion of tourism as a key economic driver for Leitrim.

4.4 2021 targets

The Leitrim Draft County Development Plan 2015-2021 states:

“The Council acknowledges there are challenges but also that there are plenty of opportunities to double the size of the tourism sector in Leitrim. The strategy will require leadership, collaboration, a clear set of targets and an investment stream from both the public and private sectors.”

Because international visitors have a much higher average spend than domestic or Northern Ireland visitors, future growth from international markets is essential, while there is also a need to grow the domestic and Northern Ireland markets to deliver the following targets by 2021:

2021 targets		
Tourist numbers	Tourism revenue	Jobs supported
296,000	€70m ¹⁵	2,400

¹⁴ The Baseline Study estimated 1,267 tourism jobs in Leitrim. This strategy’s estimate of 1,200 tourism jobs is in line with the Baseline Study’s estimate, although different methodologies are used in deriving the two estimates.

¹⁵ In real terms, i.e. 2014 prices.

Detail of targets

			Lifetime of the strategy 2015-2021						
INTERNATIONAL	2013	2014	2015	2016	2017	2018	2019	2020	2021
GB	29,000	30,450	32,277	35,505	39,055	42,961	47,257	51,982	57,181
<i>Growth rate</i>		5.0%	6.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%
US	5,000	5,250	5,565	6,678	7,346	8,080	8,888	9,777	10,755
<i>Growth rate</i>		5.0%	6.0%	20.0%	10.0%	10.0%	10.0%	10.0%	10.0%
Europe	5,000	5,250	5,565	6,400	7,360	8,464	9,733	11,193	12,872
<i>Growth rate</i>		5.0%	6.0%	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
Total international	39,000	40,950	43,407	48,583	53,761	59,505	65,879	72,953	80,808
DOMESTIC	70,000	75,250	80,894	88,983	97,881	107,670	118,437	130,280	143,308
<i>Growth rate</i>	7.5%	7.5%	7.5%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%
NORTHERN IRELAND	35,000	37,625	40,447	44,492	48,941	53,835	59,218	65,140	71,654
<i>Growth rate</i>	7.5%	7.5%	7.5%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%
TOTAL visitors (Figures are rounded)	144,000	154,000	165,000	182,000	200,000	221,000	244,000	268,000	296,000

Notes to the targets

1. Fáilte Ireland data are used as a baseline to set targets for overseas markets
2. For the domestic and Northern Ireland markets, an absence of data means that estimates have been developed as a baseline against which targets are set and future growth can be measured (see chapter 2). Over the life of the strategy, efforts must be made to gather more accurate data
3. Leitrim is very reliant on the domestic market (80%+ in some cases). Future, additional domestic growth will be targeted from people who themselves choose Leitrim for their holiday, not just to attend an event or occasion
4. There are opportunities to further grow the Northern Ireland market
5. Growth from overseas is essential: the trade has expressed a desire for more overseas visitors who have a higher per capita spend¹⁶, and the Leitrim holiday experience can deliver on the needs and motivations of certain overseas target segments. A doubling of overseas visitors would mean that Leitrim still gets just 1% of all overseas visitors to Ireland
6. 2013 is the latest year for published overseas data. Nationally, overseas visitors grew in 2014 by 9%. In the absence of data, a conservative 5% growth in 2014 is applied for Leitrim
7. Tourism Ireland predicts 6% growth in overseas visitors in 2015. This strategy targets growth of 6% in 2015 for Leitrim, with higher rates targeted from 2016. Growth is from a very low base so these rates are achievable
8. Within Mainland Europe, Germany will be prioritised. There is particular potential to target German Great Escapers because of the fit between what they want and the Leitrim tourism experience. Tourism Ireland is targeting 9% growth from Germany in 2015 but this strategy is targeting growth of 15%, again from a very low base. The Netherlands will also be targeted for angling
9. A higher growth rate is targeted from the US for 2016 to coincide with the 2016 commemorations
10. Based on current occupancy rates of 53%¹⁷, there is capacity within Leitrim's accommodation stock to cater for growth. As the strategy delivers, the private sector will see opportunities to develop additional capacity

¹⁶ Nationally, the domestic market accounts for 60% of bednights, but overseas accounts for 60% of revenue, so a greater focus on growing international tourists will also grow yield for Leitrim's tourism businesses.

¹⁷ Fáilte Ireland Hotel review 2012; Room occupancy in North West region.

11. Tourism Ireland predicts that in 2025, overseas tourism revenue will come from GB (26%), NA¹⁸ (27%), ME (34%) and ROW (13%). While there are certainly opportunities in other long haul markets, it makes sense for Leitrim to focus its international efforts on GB, NA and Europe, as it is underperforming in these markets relative to its potential
12. The Draft National Tourism Policy for Ireland states that marketing of individual counties overseas is largely ineffective. Leitrim's success abroad will be through collaboration with trade and agencies and a world class online presence. An effective online presence is vital at all levels: by Leitrim collectively, and by the trade
13. Leitrim is within a three hour drive of five international airports: Belfast, Derry, Dublin, Shannon and Ireland West Airport Knock
14. Dublin, home to 27% of Ireland's population, is around a two hour drive. Accessibility will be an important message for the domestic market
15. To meet targets, solid collaboration among Leitrim stakeholders will be required

4.5 Markets and segments

Resources will be allocated on the basis of potential. Having a targeted focus on certain markets and segments does not mean that others will not also visit Leitrim, but a narrow focus on the markets and segments that offer the best potential will strengthen the brand and give greater return on effort and resources. Chapter 5 profiles the segments and details the fit between what motivates the segments and what Leitrim can offer.

Segment	Market			
	GB	US & Canada	Germany	Domestic & N I
Culturally Curious	Culturally Curious	Great Escapers	Connected Families	
Great Escapers	Irish Diaspora		Footloose Socialisers	
Irish Diaspora			Indulgent Romantics	

Anglers in the Dutch market will also be targeted.

4.6 Developing centres of excellence

The development of centres of excellence will be key to delivering the targeted growth. Centres of excellence are built on a destination's strengths and consistently deliver its brand promise. In a centre of excellence, the core product and infrastructure are already in place or can quickly be put in place through enhancements and upgrades. Trade operating in centres of excellence have a clear understanding of and focus on their target segment; they develop and deliver experiences tailored to meet segment needs; trade and agencies proactively collaborate with each other and with neighbouring counties, and both their collective and individual marketing and sales efforts are targeted and complementary.

4.7 Conclusion

The ambitious growth targets in tourism numbers and revenue from all source markets as outlined are predicated on the strategic alignment of holiday experiences with the demands of the target segments. The strategy demands that compelling experiences are created around Leitrim's tourism product/infrastructural strengths as detailed in chapter 6. The conversion from experience development to delivering tourism numbers and revenue is founded on 6 strategic pillars as outlined overleaf.

¹⁸ NA = North America (United States + Canada), ME = mainland Europe, ROW = rest of world.

4.7 Six strategic pillars

STRATEGIC PILLARS					
Customer centricity	Product & infrastructure	Experience development	Collaboration	Marketing & sales	Governance & structure
<p>GOAL Customer at heart of everything. We understand what they want and everyone they meet on the journey (pre-visit to end of holiday) delivers a truly memorable experience.</p>	<p>GOAL All investment decisions in product/infrastructure capitalise on, but protect, Leitrim's natural & built assets. Focus on developing assets that give Leitrim a lead within competitive set.</p>	<p>GOAL All areas of Leitrim deliver a unique holiday experience built on product, service and story. Cohesive commitment to experience development creates lasting memories that drive repeat & referral business.</p>	<p>GOAL Everyone involved in tourism in Leitrim, directly and indirectly, understands its economic importance. This drives real collaboration, communication and sharing.</p>	<p>GOAL Cross-platform marketing communications inspire and influence partners and customers. Leitrim is easy to find in the places where customers search. We make it easy for them to decide and buy.</p>	<p>GOAL Delivery of the strategy is driven by a shared desire for success. Leitrim Tourism Growth Alliance (LTGA) and its various working groups lead and implement the strategy.</p>
<p>KEY ACTIONS</p> <ul style="list-style-type: none"> - Clear focus on segments that have best fit with Leitrim - Link between segment needs and Leitrim experiences - Capacity building on importance of understanding segments - Ensure that trade and public understand brand values and deliver the promise; 'every customer, every time' - Decision making led by customer insights 	<p>KEY ACTIONS</p> <ul style="list-style-type: none"> - Identify infrastructure requirements for key selling points - Focus investment on sustainability and customer needs - Improve signage, interpretation and information - Ongoing upkeep - Support for trade re accommodation approvals. Explore market intervention to encourage increased supply - Support for festivals and events 	<p>KEY ACTIONS</p> <ul style="list-style-type: none"> - Develop experiences around key selling points and products with market leading potential: Lakelands, Blueway, cruising, landscape, Northern Glens, angling, walking, cycling, WAW, eco tourism, land activities, water activities, culture, festivals, Diaspora - Continual, facilitated programme of trade familiarisation and discovery days - Capacity building to develop a culture of continuous improvement 	<p>KEY ACTIONS</p> <ul style="list-style-type: none"> - Systematic programme of communication and sharing; Leitrim Tourism, trade, LTGA, stakeholders, etc. - Local PR - public to know Leitrim's tourism story and understand their role in it - Familiarisation for local trade and public - Proactive networking and referral between tourism businesses - Collaboration with neighbouring counties 	<p>KEY ACTIONS</p> <p>International:</p> <ul style="list-style-type: none"> - Cooperation with FI/TI for PR and overseas trade activity - Co-op with airports - Digital: web, SEO, social media, web internationalisation - In-Ireland TO workshops <p>Domestic & NI:</p> <ul style="list-style-type: none"> - PR - Digital marketing (as above) & CRM - Joint consumer promotions <p>Measurement:</p> <ul style="list-style-type: none"> - Key performance indicators for measurement 	<p>KEY ACTIONS</p> <ul style="list-style-type: none"> - LTGA lead strategy implementation - Develop working groups and activation teams - Develop coherence and shared knowledge around annual work plans - Augment LTGA if gaps exist - Strong stakeholder relationships; trade, communities, agencies - Identify and secure funding based on strategy needs
Underpinned by open communication and partnership					

5. Pillar 1: Customer Centricity

5.1 Pillar goal

When the strategy is working at its best, the customer is at the heart of everything. Stakeholders are fully familiar with the segments that present the best potential, and they understand holiday motivations and needs. Everyone the customer meets along the journey, from pre- to post-visit, does everything they can to satisfy the customer's needs and motivations.

5.2 Underlying principles

- To be successful businesses and destinations must intimately understand their customer and their motivations, and do everything possible to deliver what the customer want
- All decisions - about the product, the experience, collaboration and promotion - should be made with the target customer clearly in mind
- Focusing on a narrow target doesn't mean that others won't visit, but a narrow focus means a stronger brand and a better use of resources
- Successful tourism destinations pick winners and focus on them. Leitrim will be more successful by having a clear focus, rather than trying to appeal to too wide an audience



A clear picture of the target customer underpins every decision

5.3 Key actions to deliver customer centricity

1. Programme of capacity building for tourism businesses and stakeholders on the ongoing importance of customer research – how to gather and use customer information at the collective level and at individual business level
2. Communications programme to ensure that tourism stakeholders understand and deliver Leitrim's brand values
3. Ongoing training for staff to deliver the promise to 'every customer, every time' and to help businesses to think like their customer and anticipate their needs
4. Specific campaign for local people to underline the importance of tourism to Leitrim's economy and the importance of delivering on the brand values by everyone; including people not directly involved in tourism

5.4 Leitrim's target segments

Segmentation is the grouping of people according to values and motivations. Tourism segmentation looks at why people take holidays and what they want to feel and experience, both during and after the holiday. Fáilte Ireland and Tourism Ireland have carried out extensive international research¹⁹ and identified the target segments that have the best potential or fit with what Ireland offers as a holiday destination. It makes sense that Leitrim also employ this approach to its segmentation. The segments with the best potential for Leitrim are examined in detail over the following pages.

Segment	Market			
	GB	US & Canada	Germany	Domestic & Northern Ireland
Culturally Curious	Culturally Curious	Great Escapers	Connected Families	
Great Escapers	Irish Diaspora		Footloose Socialisers	
Irish Diaspora			Indulgent Romantics	

Anglers in the Netherlands will also be targeted.

Section 5.5 presents a detailed profile of the target segments. This is followed by a summary which shows the fit between what each segment wants from their holiday and how and where Leitrim can match those expectations. Gaps and opportunities for future product and infrastructural developments are outlined in chapter 6.

¹⁹ 14,000 interviews and 20 focus groups between 2012 and 2014. The segmentation model was first used in the GB market and then rolled out to other main markets in 2014.

5.5 INTERNATIONAL: Culturally Curious – Great Britain and North America



Who are the Culturally Curious?

- Independent 'active sightseers' looking to visit new places. They choose their holiday destinations carefully
- They want to 'do a place' and are unlikely to return for some time once they have visited it
- They travel as couples or on their own. If they have children, they have grown up or have left home. Higher proportion of single adults and couples, fewer family groups, slightly biased towards females. Most Culturally Curious are 40 or over
- Typically Culturally Curious travellers are out to broaden their minds and expand their experience by exploring new landscapes, history and culture. They are curious about everything and are delighted to discover the world for themselves once again

Where are they from?

- The Culturally Curious customer for Leitrim lives in Great Britain, the United States or Canada

What do they want from their holiday?

- Interested in all that a place has to offer, and are attracted to authentic travel
- They love to delve deeper into the history of a location, and crave unusual experiences and enjoy connecting with nature and wandering off the beaten track
- They won't choose a brand or visit a place just to follow the herd. This is their own exploration and they really want to cover everything
- They love to discover history and always find ways of getting real insight. They are looking to encounter new places and experiences that are out of the ordinary. They like to feel that they have not only broadened their mind but also immersed themselves in a place, giving their senses a holiday too – the sights, the sounds, the smells, the tastes. They enjoy connecting with nature and getting off the beaten track
- They like people to show an interest and educate them - to feel they've connected. They really appreciate personal guides

What don't they want from a holiday?

- To party; to see things they've seen before; to do package trips, 'laid on' activities or to be told what to do

Where are they most likely to be seen?

- Exploring landscapes – Megalithic or early Christian relics
- In castles, gardens, museums and art galleries
- Literary connections, visitor centres, browsing for books to deepen their experience
- Enjoying good food and wine, particularly local specialities
- At unique local festivals and events
- Walking, cycling, or pleasure boating to explore a new place

How long are they likely to stay and where?

They choose accommodation in places where they will find lots to see and do. They will usually choose somewhere with access to scenery and good walks. They are three times more likely to take long breaks than the average tourist and also take more short breaks than average, both at home and overseas. They are unlikely to return for a while, unless a destination is truly diverse, preferring to move on to new discoveries.

What are they likely to pay more for?

- Something that is out of the ordinary
- Superior service – “people recognise me by name”
- Trade that is interested in me – “knows me, knows what I want”
- A human guide that offers real insight into the history of a place
- Environmentally friendly features

What are their media habits?

- Their use of social media is growing
- Medium to heavy TV which drives some online search
- Lighter internet usage – preference for search rather than social media
- Newspapers are prominent
- Radio is important

Food and drink preferences

Food is important to this group and they see it as a way to really engage and connect with the local culture and people. They will seek out places to eat that serve local or regional specialities and will expect staff to be able to talk to them about the food. Examples of their preferences:

- Peace and quiet with good wine and food
- Classic Irish menu with a twist
- Good quality food because “I’m looking after my health”
- Personalised service where people call me “Mr.”
- Mid-morning breakfast “so I can sleep in ...”
- They want to have the best table in the room
- They expect good service and knowledgeable staff
- To know the story and provenance of what they are eating
- A good quality meal with healthy/dietary options
- To dine a la carte and house specialities
- Comfortable bar/lounge that is not too noisy but has a nice ambiance
- Chance to chat to the locals, and get tips and recommendations on good places to eat

Food experiences that will appeal to Culturally Curious

- Learn to make scones in their B&B
- Visit a food festival or take in a food trail to sample produce and meet the producers
- Stop for lunch by the fire in an authentic rural pub

Note: Some Great British and North American Culturally Curious customers will be part of Leitrim's Diaspora so they will have the added motivation of tracing their roots or connecting with family members.

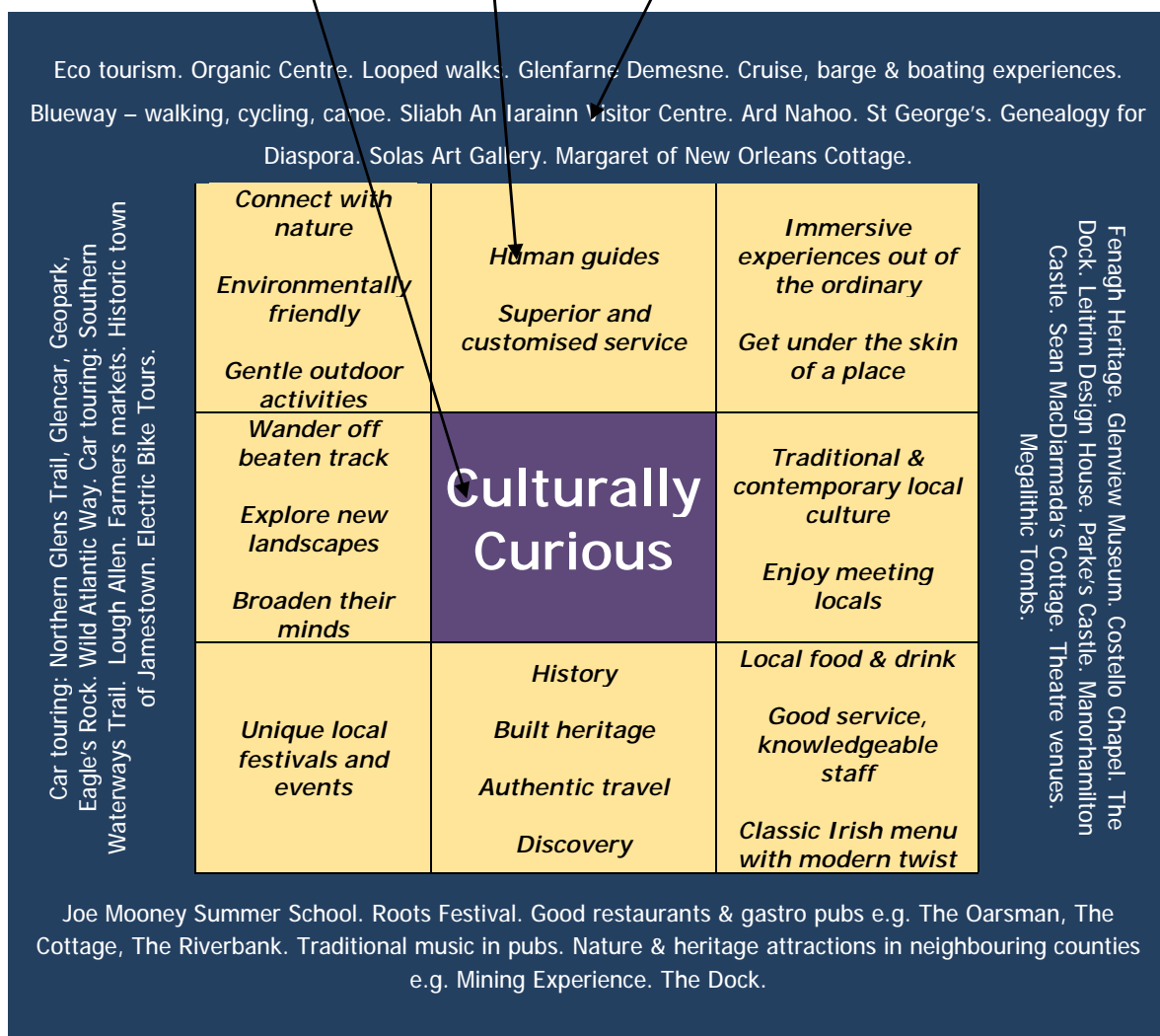
The fit between the Culturally Curious and the Leitrim experience

Below are examples of how Leitrim’s products can appeal to the Culturally Curious from Great Britain, United States and Canada.

Centre tile: Target segment

Inner tiles: Summary of **Culturally Curious** needs and motivations

Outer tiles: Examples of Leitrim’s tourism products around which memorable experiences can be developed. With the support of capacity building in customer centricity, experience development, and sales and marketing, some are market-ready or near market-ready; others require capital investment as well as capacity building and effective promotion (see chapter 6).



Note: This is a sample of Leitrim’s products that can be transformed into memorable experiences for the target segment. Once experiences are developed, it will be important that they are promoted using language and imagery that appeal to the customer; long lists of products on websites or other promotional platforms are not effective.

5.6 INTERNATIONAL: Great Escapers – Germany and Great Britain



Who are the Great Escapers?

- They are often couples, approximately 30 years old, some with babies or quite young children
- Most are in serious need of time out from busy lives and careers
- Specifically interested in rural holidays and travel very much as a couple or family
- They are on holiday for a break, to get physical with nature, and to reconnect with their partner
- More likely to take part in slightly more strenuous, but not extreme, exploration
- More interested than other segments in getting connected to nature especially in more remote and exciting places

Where are Great Escapers from?

The Great Escaper customer for Leitrim most likely lives in a German city; Köln, Frankfurt or Berlin, or in a city or outskirts in England; London, Manchester, Birmingham. The Great Escaper from Berlin is very similar to the Great Escaper from London and the fit between what they want and what Leitrim can offer is very strong.

What do they want from their holiday?

To connect with the landscape, to feel the earth beneath their feet, to soak up the beauty. A sense of history, of their place in the vastness of nature – they want to feel part of it. Against this kind of backdrop Great Escapers can spend real quality time bonding with those closest to them. They can rebalance themselves and take stock of their lives, concentrating on what's important to them. They appreciate peace and quiet between activities ... the point is the trip itself. It's 'down time', it's being off the beaten track, it's a great escape. But it's important that getting away from it all is easy enough – they want the 'wow' factor without too much effort. Most importantly, Great Escapers want to come home refreshed and revitalised, their batteries recharged.

What don't they want from a holiday?

To make connections with other people – locals or others on holiday - they don't need to, they're there to be with each other. They don't like crowded places.

Most likely to be seen...

- Escaping to breath-taking landscapes
- Actively exploring more remote and exciting places, on foot or by bicycle
- Standing enveloped in each other's company on the top of a mountain or cliff
- Visiting a castle or a landmark
- Gentle exploration of the place - walking, cycling, pleasure boating
- Relaxed meal of fresh local produce, or a fun evening in an authentic pub

How long are they likely to stay and where?

- They are likely to take more short breaks than the average visitor
- Wide choice of accommodation and more likely to choose self catering than other segments

What are they likely to pay more for?

- Superior service – “people recognise me by name”
- Trade who are interested in me – “knows me, knows what I want”
- Something that is out of the ordinary
- Things that take the hassle away

What are their media habits?

- Light to medium TV users, due to busy schedule and young children. Programmes choice often dictated by children
- Internet is key source of information for work and leisure
- Light-medium users of social media
- Light-medium use of newspapers; catching up on news online is popular
- Cinema visit every 2-3 months, often with children

Food and drink preferences

Great Escapers are attracted by cosy dining options in cafés, pubs and restaurants or family options for those with young children. As they spend a lot of time outdoors foods that can be used for picnics are also very attractive. Examples of their preferences:

- An authentic experience in a local hotel or pub
- Great quality local food at a value price
- A high energy breakfast and the option of bringing a picnic lunch
- A quiet room so I can unwind from my hectic schedule
- An Irish cheese board by the fire at night
- A cosy table for two away from hustle and bustle
- A good kids menu for those with young children
- A local market where they can buy artisan food for a picnic
- Options to order food hampers to be at their self-catering on arrival
- Enjoy an Irish coffee after dinner in a comfortable lounge
- Room service options

Food experiences that will appeal to Great Escapers

- Catch a fish – off a pier or on a boat trip – ask the local restaurant to cook it for them
- Eat the view – a picnic from local specialities, then enjoy it at a picnic spot with views across the ‘natural larder’
- Stay on a farm – collect their own eggs & pick their own greens
- Visit food festivals and walking or cycling food trails – to meet producers and sample local produce

Note: Some GB Great Escaper customers will be part of Leitrim's Diaspora so they will have the added motivation of tracing their roots or connecting with family members.

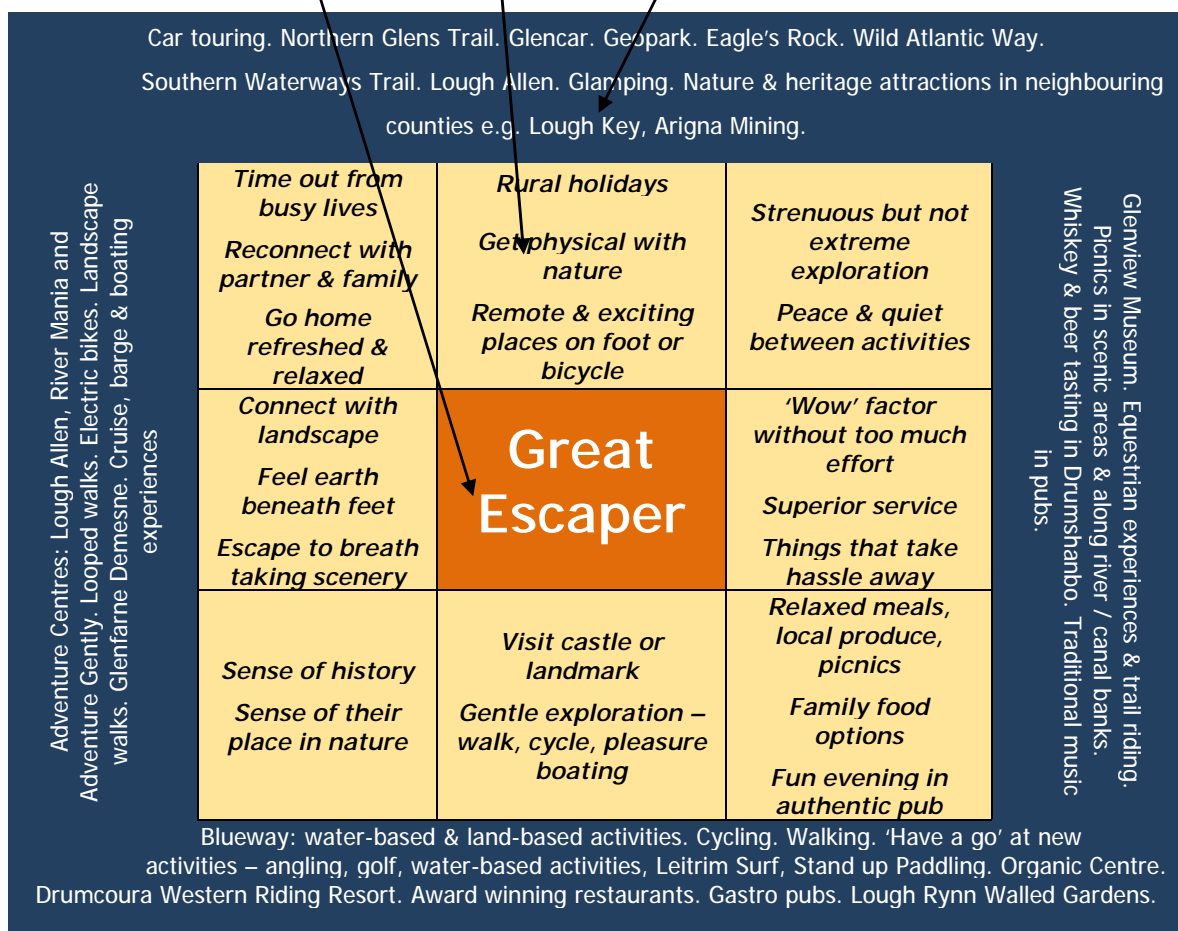
The fit between the Great Escaper and the Leitrim experience

Below are examples of how Leitrim's products can appeal to the Great Escaper from Great Britain and Germany.

Centre tile: Target segment

Inner tiles: Summary of Great Escaper needs and motivations

Outer tiles: Examples of Leitrim's tourism products around which memorable experiences can be developed. With the support of capacity building in customer centricity, experience development, and sales and marketing, some are market-ready or near market-ready; others require capital investment as well as capacity building and effective promotion (see chapter 6).



Note: This is a sample of Leitrim's products that can be transformed into memorable experiences for the target segment. Once experiences are developed, it will be important that they are promoted using language and imagery that appeal to the customer; long lists of products on websites or other promotional platforms are not effective.

5.7 DOMESTIC: Connected Families – Ireland and Northern Ireland



Who are they?

- Connected Families make up 23 percent of the domestic market, the single largest segment
- Relatively young families; parents 30s-early 40s, children generally under 10
- For Connected Families, family holidays are the best weeks of the year and a special opportunity to spend quality time together, creating memories to last a lifetime

Where are they from?

Predominantly from urban areas; Dublin, Cork, Belfast and Galway.

Holiday planning

They put their heart into planning and finding out everything a destination has to offer, the best places to stay, the hidden gems and all the activities available that can be shared by adults and children together. For them it is not about having a plan for every day rather knowing that there are lots of 'things to do together' nearby and making sure their accommodation and facilities really suit their needs.

What they want from a holiday

Connected Families enjoy a holiday that offers a variety of things to see and do in a place that feels special. Whether it's fun at a petting farm, picnicing, learning to surf, catching shellfish on the beach or taking a walk on a local nature trail, as long as they're doing it together, they're happy. For the parents it's all about their children being happy and enjoying themselves. They want to make the most of the opportunity to really 'be' with their children and love to see them do and enjoy the same simple things they did when they were children themselves. They are seeking to create special memories that they can treasure, sharing experiences that they can fondly look back on in the months and years to come.

Holiday behaviour

- Connected Families tend to plan and book their holidays well in advance (3-6 months)
- They do most of their booking online
- On average family breaks tend to last between four and seven days
- Most likely to stay in hotels or holiday homes
- They tend to rely heavily on hotel/accommodations websites, review websites, social media and personal recommendations when deciding on where to holiday and on their choice of accommodation
- After their return, they try to hold on to those special holiday memories for as long as possible by sharing stories and photos with friends and family on social networks

Food experiences for Connected Families

- Eat fish and chips outside - tastes better in the fresh air after a fun day out together
- Stay on a farm – collect eggs, pick greens and help bake scones for their tea
- Attend a food festival – for tastings, barbeques, cooking competitions and fun with food
- Cycle along the Blueway and call into a local café for homemade cakes fresh from the oven

The fit between Connected Families and the Leitrim experience

Below are examples of how Leitrim’s products can appeal to Connected Families from Ireland and Northern Ireland.

Centre tile: Target segment

Inner tiles: Summary of **Connected Families** needs and motivations

Outer tiles: Examples of Leitrim’s tourism products around which memorable experiences can be developed. With the support of capacity building in customer centricity, experience development, and sales and marketing, some are market-ready or near market-ready; others require capital investment as well as capacity building and effective promotion (see chapter 6).



Note: This is a sample of Leitrim’s products that can be transformed into memorable experiences for the target segment. Once experiences are developed, it will be important that they are promoted using language and imagery that appeal to the customer; long lists of products on websites or other promotional platforms are not effective.

5.8 DOMESTIC: Footloose Socialisers – Ireland and Northern Ireland



Who are they?

Footloose Socialisers make up 15 percent of the domestic market. On average in their late forties and well educated, they are made up of groups of friends who enjoy getting away and spending quality time together. What matters most to them is being with like-minded people, whether they're old friends or new acquaintances.

They really love the opportunity to get a break from their routines and responsibilities. For Footloose Socialisers a weekend with friends is a reminder of their youth and they love to break out, really relax and enjoy themselves.

Although value conscious, Footloose Socialisers regularly take short breaks with friends - going to rugby matches, hill walking, attending music and cultural festivals or just playing a few rounds of golf.

Where are they from?

Predominantly from urban areas; Dublin, Cork, Belfast and Galway.

What they want from a holiday

- Seeking to share experiences with people they can relax and be themselves with – experiences that bring people together and enrich life
- Want to do this in authentic and interesting surroundings
- They reject the idea of a package holiday
- They believe that it's good to go off the beaten track every now and again, try out different places, meet the locals and really get under the skin of a place
- Enjoy good food and drink and tend to be interested in the history and culture of the place

Holiday behaviour

- Tend to book closer to travelling, with one in three trips booked less than a month in advance
- They do most of their booking online
- On average their breaks tend to be for 1-3 three days and they demonstrate a stronger tendency to stay in holiday homes/rentals than other segments, although they are also likely to stay in hotels
- They tend to rely heavily on review websites and online booking agent sites (OTAs) and personal recommendations when deciding on where to holiday and their choice of accommodation
- As active users of social media they share stories and pictures from their breaks online

Food experiences for Footloose Socialisers

- Visit a town on market day, when things are in full swing and restaurants and pubs are buzzing
- Pick a traditional music and dancing seisiún at a pub with rooms – way off the beaten track

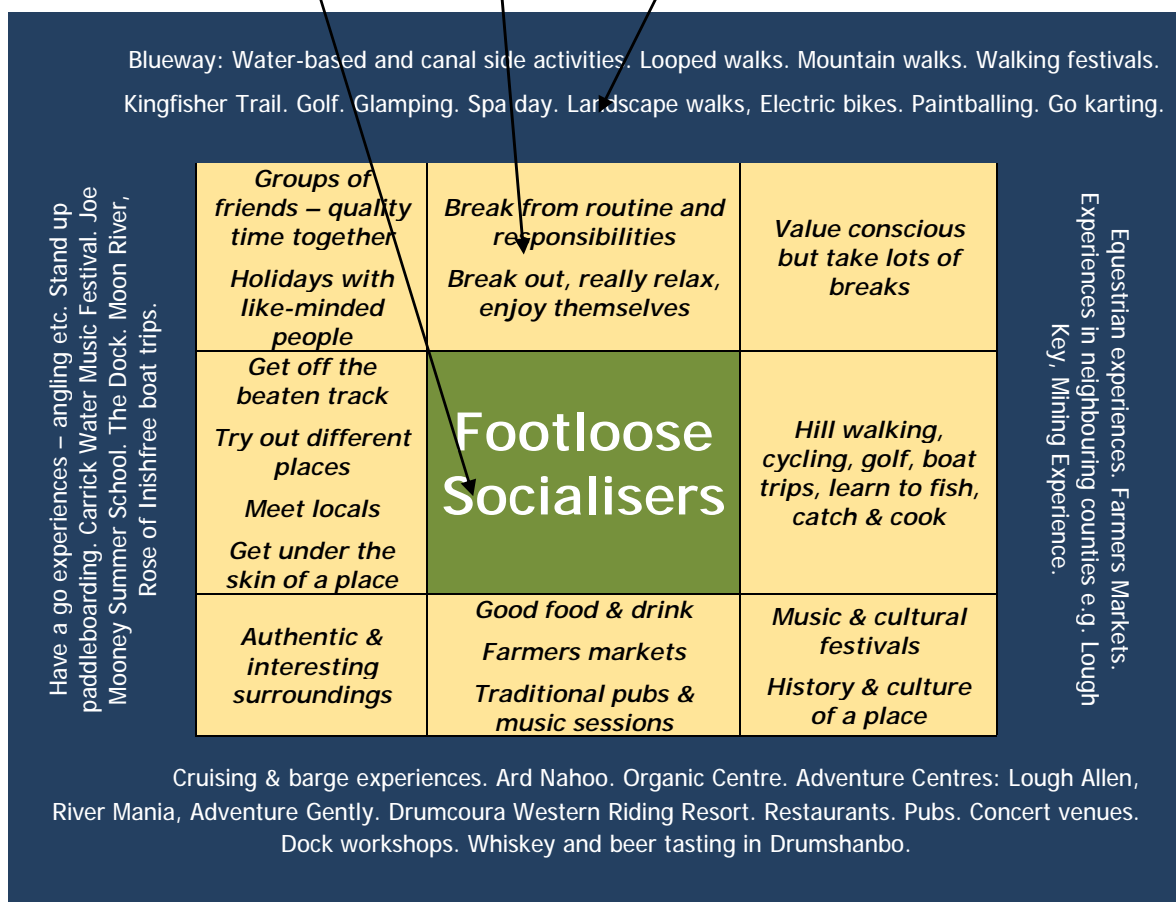
The fit between Footloose Socialisers and the Leitrim experience

Below are examples of how Leitrim's products can appeal to Footloose Socialisers from Ireland and Northern Ireland.

Centre tile: Target segment

Inner tiles: Summary of **Footloose Socialier** needs and motivations

Outer tiles: Examples of Leitrim's tourism products around which memorable experiences can be developed. With the support of capacity building in customer centricity, experience development, and sales and marketing, some are market-ready or near market-ready; others require capital investment as well as capacity building and effective promotion (see chapter 6).



Note: This is a sample of Leitrim's products that can be transformed into memorable experiences for the target segment. Once experiences are developed, it will be important that they are promoted using language and imagery that appeal to the customer; long lists of products on websites or other promotional platforms are not effective.

5.9 DOMESTIC: Indulgent Romantics – Ireland and Northern Ireland



Who are they?

- Indulgent Romantics make up 14 percent of the domestic market
- Very high propensity to stay in hotels - the perfect, romantic hub for their couples getaway
- Although relatively broad in terms of age profile they are more likely than average to be 45-64
- Interested in going to different places and enjoy new cities, particularly shopping, pampering, great food and the little indulgences in life. Enjoy spontaneous weekend breaks to get away from stresses and bustle of their daily lives
- Savvy trip planners, they are always keen to find a good deal for a particularly nice hotel they've had their eye on. Interested and knowledgeable about quality travel, restaurants, food and wine, they tend to be in-the-know about what's hot and what's not

Where are they from? Predominantly from urban areas; Dublin, Cork, Belfast and Galway.

What they want from a holiday

They are made up of couples whose ultimate goal is to find the perfect romantic hub for their holiday where they can soak up the luxury, reward themselves, be well looked after and reconnect with one another. Just being together and treating themselves a little really helps them to rebalance.

Prefer to spend money on accommodation rather than activities and expect a certain standard of comfort in their accommodation and hospitality.

Holiday behaviour

Indulgent Romantics are more likely than any other segment to book their accommodation well in advance; however they do also act spontaneously and may book at short notice if the right offer comes up. They do most of their booking online. On average their breaks tend to be for between one to three days and they demonstrate very high propensity to stay in hotels.

Tend to rely heavily on hotel and booking agent sites (OTAs) for recommendations on where to go and where to stay (using a relatively narrow range of information sources compared to other segments). Although they actively research & review destinations & accommodation online they are not active social media users.

Food experiences for Indulgent Romantics

- Take breakfast in bed – with home bakes and organic local fare – in a boutique hotel
- Back at the country house hotel after a winter walk, sit by log fire, scones straight from the oven
- Enjoy views and sunsets, the freshest local produce in restaurants and pubs
- Homemade food, local craft beer: quiet, relaxing lunch by a turf fire in a rural pub
- Luxury candlelit dinners – fine wines plus the finest Irish produce

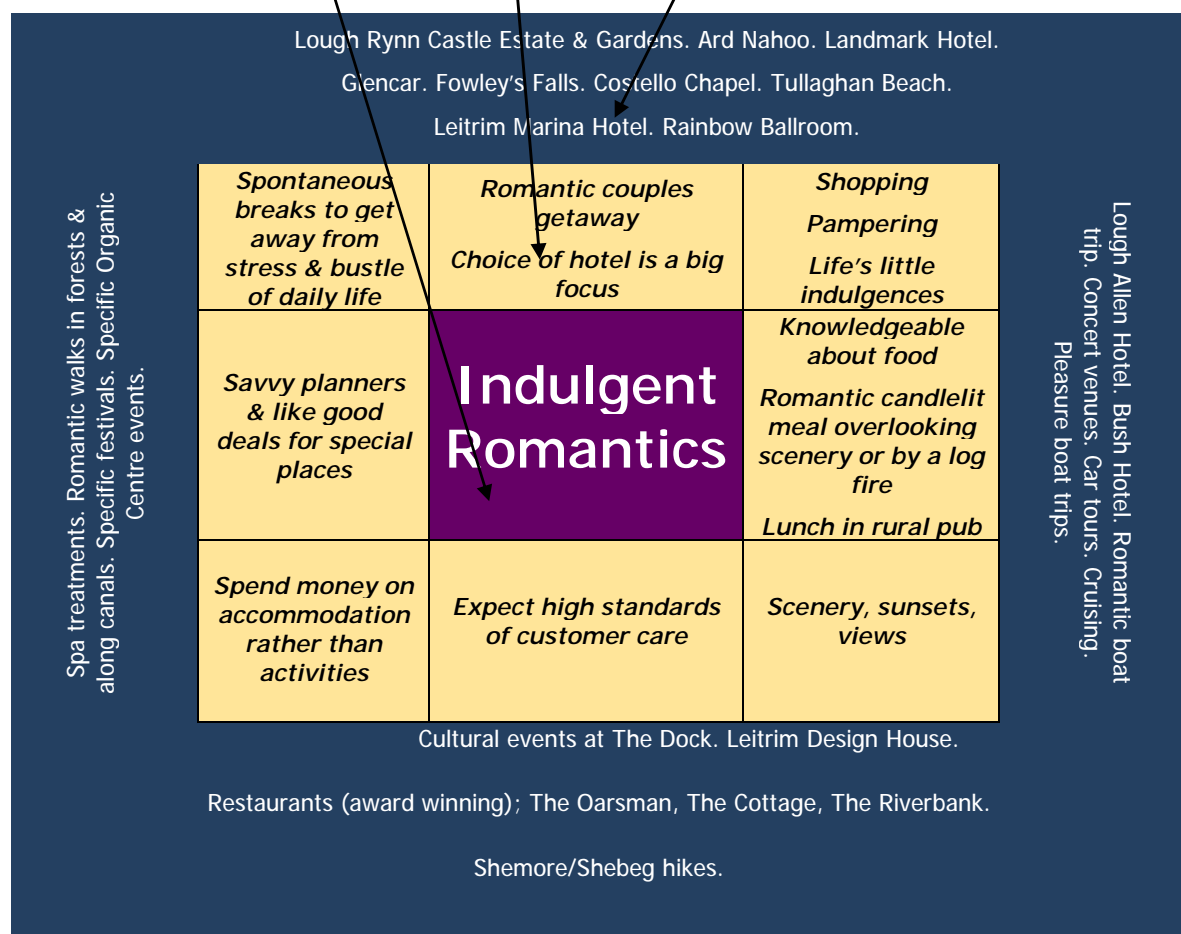
The fit between Indulgent Romantics and the Leitrim experience

Below are examples of how Leitrim's products can appeal to Indulgent Romantics from Ireland and Northern Ireland.

Centre tile: Target segment

Inner tiles: Summary of **Indulgent Romantic** needs and motivations

Outer tiles: Examples of Leitrim's tourism products around which memorable experiences can be developed. With the support of capacity building in customer centricity, experience development, and sales and marketing, some are market-ready or near market-ready; others require capital investment as well as capacity building and effective promotion (see chapter 6).



Note: This is a sample of Leitrim's products that can be transformed into memorable experiences for the target segment. Once experiences are developed, it will be important that they are promoted using language and imagery that appeal to the customer; long lists of products on websites or other promotional platforms are not effective.

6. Pillar 2: Product and Infrastructure

6.1 Pillar goal

When the tourism strategy is working at its best, all investment decisions in product and infrastructure capitalise on, but protect, Leitrim's natural and built assets. The focus is on selectively developing world-class tourism assets that give Leitrim a market lead within its competitive set.

6.2 Underlying principles on product and infrastructure

- Developments are prioritised where they represent key selling points which are market-ready or near market-ready, or where there is potential to be market leading in the future. Spreading resources too thinly will not achieve the ambitious targets – a disciplined approach to investment choices will be required
- For many of Leitrim's products, the asset already exists; it is the soft supports that need investment
- A sense of urgency to complete projects where Leitrim can cement first mover advantage is essential
- All funders and funding mechanisms co-operate fully to optimise capital investment
- Product and infrastructural developments will be aligned with the national approach of focussing on key propositions, i.e. The Lakelands and The Wild Atlantic Way
- Product and infrastructural developments are always informed and led by the demands of the target segments; they are not shaped by the availability of specific funds
- Seamless co-operation with the Recreation Forum to build on its work in delivering recreation amenities. Similarly, full cooperation with community led initiatives, events and projects
- Critical gaps in product and infrastructure outside of the Recreation Forum's remit e.g. accommodation, interpretation, signage, heritage and culture are examined
- Maintenance programmes will ensure infrastructure remains at world class standards
- Leitrim works closely with neighbouring counties on significant regional projects such as the Sligo, Leitrim and Northern Counties Railway (SLNCR) and the Cavan Leitrim Greenway

Note: This strategy endorses the actions outlined in both the Recreation Strategy and the Baseline Study. In this chapter, relevant recommendations as outlined in the earlier reports are prioritised and the rationale behind the recommended approach is presented.

6.3 Priority product and infrastructural requirements

National tourism policy states that "While the quality of Ireland's tourism physical assets is quite strong, it is recognised that the experience is now the primary focus for the worldwide tourism industry". In line with national policy, it is recommended for this strategy that "capital investment in tourism will recognise the need for investment in both physical assets and in other areas that provide a lasting improvement in the overall quality of the visitor experience".

For Leitrim to create and deliver outstanding holiday experiences, it is essential that the product base on which holiday experiences are built is outstanding in its own right. It is not realistic to expect that Leitrim can be outstanding across all products, but it is essential that the county secures and safeguards an international reputation as a compelling destination of choice in specific product areas. Leitrim's products have been categorised as:

- Key selling points that are market-ready or near market-ready
- Key selling points with market leading potential
- Products that add value to key selling points but are not major draws in their own right
- General (accommodation, food etc.)

In the short to medium term, some will need capital investment in physical assets e.g. walkways, cycle paths, slipways, fishing pegs etc. Others are unlikely to need major capital investment in the short term (although over the life of the strategy, all products will require some level of capital for upgrades and repairs). However, in the short, medium and long term, all products and product owners/managers need investment in other areas e.g. capacity building, networking, experience development, marketing.

Leitrim’s key selling points that are market-ready or near market-ready

Product	Rationale	Investment in physical assets	Investment in other areas
Shannon Blueway	Aligned with Lakelands proposition	X	X
Northern Glens Experience	Aligned with Wild Atlantic Way proposition	X	X
Cruising	Aligned with Lakelands proposition	X	X

Leitrim’s key selling points with market leading potential

Product	Rationale	Investment in physical assets	Investment in other areas
Angling	Regain market leading status	X	X
Walking	Capitalise on market demand	X	X
Cycling	Capitalise on market demand	X	X
Lough Rinn Rowing Facility	Secure market leading status	X	X
Adventure tourism	Capitalise on market demand		X
Eco tourism	Regain market leading status		X
Diaspora & genealogy	Capitalise on Diaspora potential		X

Products that add value to key selling points

Product	Rationale	Investment in physical assets	Investment in other areas
Festivals and events	Adds value to key selling points		X
Heritage and culture	Adds value to key selling points		X
Business tourism	Adds value to key selling points		X

Public investment in infrastructure and facilities will create opportunities for private sector investment. For example, growing visitor numbers to the Northern Glens experience will spur investment by the private sector in accommodation in the area, growing use of the Blueway will encourage additional or increased capacity in activity providers to cater for customer demand.

As noted above, Leitrim has a number of excellent products which offer significant potential to appeal to the target segments. The model for growth is built on transforming these products into customer centric experiences – a gap in the current offering. This gap can be closed through capacity building, increased collaboration and effective, targeted promotion.

Leitrim's key selling points that are market-ready or near market-ready

Shannon Blueway – "Ireland's Blueway"

Blueways are defined as "A path or trail that is developed with launch points, camping locations and points of interest for canoeists, paddle boaters, kayakers, walkers and cyclists". The Shannon Blueway, Ireland's first inland blueway offers Leitrim first mover advantage to become synonymous with blueways. In the same way as Mayo has optimised the potential of the Great Western Greenway (which has seen a jump in visitor numbers from 80,000 in 2011 to 300,000 in 2014 generating an extra €5 million for the region), Leitrim has an opportunity to position itself as the official home of Ireland's blueways.

A number of critical facts can support this;

- Has more waterways than any other county and offers 100 km of paddling and walking routes in the area surrounding the Shannon Blueway
- Connects 14 towns along the blueway route with Waterways Ireland facilities in 12 towns and service blocks in eight
- Has seven activity providers already operating successfully along the 16km stretch
- Can offer a substantial and varied accommodation base along the route
- Has a strong county recreation strategy in place with working groups supporting the ongoing development of the Shannon Blueway

The Baseline Study states that "The waterways of Leitrim are its greatest tourism asset; they provide both an invaluable tourism resource and an important mode of access to County Leitrim". However, it adds "There is a need to differentiate Leitrim waters and build on the added value".

There is no doubt that the Shannon Blueway is key to differentiating Leitrim's waterways and it can be a strategic driver in delivering many aspects of the Experience Development pillar (see chapter 7). It is also certain that the multi-use experience the Shannon Blueway offers will be of interest to the target segments as outlined in chapter 5.

Recommended actions

1. Prioritise investment in the Shannon Blueway to expedite the completion of the multi use trail (family friendly walking and cycling) ensuring connectivity between all stretches of the route, and connectivity from the waterways to adjacent towns and villages. Waterways Ireland is already working on the development of blueways in other counties. For Leitrim to cement its first mover advantage as Ireland's first inland blueway, it must ensure the completeness of the product offering including Battlebridge to Drumshanbo and the phase two stretches from Leitrim village to Ballinamore, Carrick on Shannon to Rooskey, Lough Key and Boyle, and from Acres Lake to Drumshanbo. These developments will solidify Leitrim's position as official home of Ireland's blueways.
2. Implement a proactive approach across all key agencies to identify, support and fund new and existing tourism enterprises (community and private) that add value to the Shannon Blueway experience. This should include, but is not limited to; adventure operators, equipment hire businesses, accommodation, food, guides, heritage interpretation etc.

Northern Glens Experience

Given the scenic nature of Leitrim and the interest amongst the target segments to 'connect with nature and wander off the beaten track', driving routes such as Northern Glens Trail can draw visitors into north Leitrim to some of the county's most interesting natural and built heritage sights such as Manorhamilton Castle, Glencar Waterfall, Parke's Castle, Fowley's Falls, the Cavan Burren Geopark, Organic Centre, Glenfarne, Famine Graveyard etc. In addition to heritage and cultural experiences,

there is enormous potential for family friendly walking and cycling which should be exploited to encourage longer stay and greater spend in the area.

The Northern Glens Experience starts on the Wild Atlantic Way. The Fáilte Ireland focus on the Wild Atlantic Way from 2015 will be on developing loops and spurs off the Wild Atlantic Way. Leitrim needs a hook to achieve stand out on the Wild Atlantic Way and this can be achieved through exploring the potential to develop an experience around the Wild Atlantic Salmon at the Duff and Drowes Rivers.

Recommended actions

1. Prioritise investment in way-finding and landscape interpretation along key driving routes
2. Work with stakeholders and surrounding product to identify investment requirements in value added product that will optimise the Wild Atlantic Salmon experience for visitors as the hook for Leitrim to gain standout on the Wild Atlantic Way
3. Investment in marketing and promotion and in capacity building will ensure providers along the routes can optimise the route's potential and empower them to consistently deliver on the brand promise at every interaction with the target segments

Cruising

The 2014 ITIC²⁰ report 'Ireland's Inland Waterways – Review & Outlook' states that "Ireland's waterways system is reputed to be one of the best and least cruised in Europe, despite an increase in competitor destinations". 83% of the demand for inland cruising comes from overseas markets, with Germany the main source market. Germany, Switzerland and Austria combined account for 80% of overseas demand; Domestic and Northern Ireland represent approximately 20% of total market demand.

Despite the catastrophic fall off in the inland cruising market, the ITIC report notes the strategic fit between the boating holiday experience and the leisure aspirations of the target segments. The report notes the underperformance in this high value, niche sector and recommends that the key to unlocking future potential "is a customer focused mind set, supported by strong partnerships between the boat hire businesses, Fáilte Ireland, Waterways Ireland and Tourism Ireland". In essence, this means expanding the experience beyond the water in collaboration with other tourism providers in the county and addressing the marketing deficit.

Leitrim, through the Leitrim Tourism Growth Alliance and the stakeholders represented by the Alliance, has a unique opportunity to take a market lead in optimising the future potential for this sector;

- Carrick-on-Shannon is one of just three hubs in the Lakelands proposition
- The town is home to 75% of the cruise hire fleet
- Recent years have seen considerable growth from Germany, the number one market for cruise hire with a 9% future growth target nationally
- As a microcosm of the Ireland brand experience, there is a perfect fit between customer expectations and what Leitrim can deliver

Recommended actions

1. Proactively engage with cruise hire operators and relevant tourism stakeholders (e.g. Leitrim Tourism Ltd, international tour operators who specialise in cruising, airports including Ireland West Airport Knock, activity providers) to aggressively target the German market in 2015/2016
2. Proactively engage with cruise-hire operators to expand the offer beyond the water

²⁰ ITIC – Irish Tourist Industry Confederation

Leitrim's key selling points with market leading potential

Angling

The Baseline Study notes, "Leitrim has been recognised as being one of the outstanding angling destinations in Europe". The Recreation Study adds "Angling has provided the backbone of Leitrim tourism for three generations".

A 2013 Inland Fisheries Ireland study found that recreational angling is worth €750 million and directly supports 10,000 Irish jobs, many of which are located in the most peripheral and rural parts of the Irish countryside, in areas such as Leitrim.

Following years of decline in recreational angling participation, Fáilte Ireland research in 2013 identified growth potential. It identified that the greatest opportunities exist in Germany followed by France and Britain. All three markets have performed well as source markets for Ireland in 2014.

Angling is a market in which Leitrim can and should reclaim its market leadership position over the lifetime of this strategy. The Recreation Study identifies that "In order to invest with confidence in a new angling tourism offering, both structural and marketing solutions are required". As with many aspects of the tourism industry, the motivations and needs of the angling customer have changed. In addition to changing customer demands, the character of the product itself, i.e. the fishing waters, is also changing. These changes result in a need for a different approach. To successfully compete in international and domestic angling markets, Leitrim must respond to those changes.

The National Angling Development Plan is currently being formulated by Inland Fisheries Ireland (IFI) and when published in spring 2015, will include development proposals for the improvement of the angling product in Leitrim. The IFI has also commissioned a study, 'Economic Impacts of Angling Events in Ireland', and when published (spring 2015) the findings and recommendations should feed into developments of angling competitions in Leitrim.

Recommended actions

1. Once available, use the National Angling Development Plan to prioritise investment in the angling product. Given likely funding limitations, it will be necessary to prioritise angling centres in the county that offer the best potential for the quickest return on investment; angling centres that are market-ready and in a position to meet customer demands and expectations in every aspect of the angling experience i.e. centres of excellence – Ballinamore could be one such centre of excellence. The longer-term objective should be to roll out investment to all angling centres in Leitrim over the life-time of the strategy
2. In spring 2015, consult the 'Economic Impacts of Angling Events in Ireland' and identify high profile angling events/competitions to bring to Leitrim
3. Implement the actions associated with angling in the Leitrim Recreation Strategy; product developments and other actions such as the angling marketing promotion
4. Implement a proactive approach across all key agencies to identify, support and fund new and existing tourism enterprises (community and private) that add value to the angling product. This should include, but is not limited to, angling operators, equipment hire businesses, accommodation, guides, development of 'give fishing a go' opportunities for non-anglers etc.

Walking

Walking is Ireland's most popular activity for international tourists. It also holds significant appeal for the domestic market. Leitrim has a number of walking assets including the Beara Breifne Way / Leitrim Way, looped walks, North Leitrim Glens and the Sliabh an Iarainn Boardwalk. Some are market ready and others at various levels of development. Given the beauty of the county and the appeal of walking to the targets segments, further development is important.

The Baseline Study notes the North Leitrim Glens as a wonderful tourism asset, that without local knowledge, are difficult to access, with limited signage and poor mapping information. The Recreation Strategy has outlined a road map for the development of countryside walking and the walking working group has prioritised a work plan for specific walking trails.

The Sligo, Leitrim and Northern Counties Railway (SLNCR) and the Cavan Leitrim Greenway offer immense potential as flagship walking projects. Much work has been undertaken by the local authorities and local communities, with 2016 a potential timeframe to commence the planning process, subject to resources and findings from screening and feasibility studies.

The progression of these developments will enable Leitrim to successfully compete with other walking destinations.

Recommended actions

1. Implement the actions associated with walking in the Leitrim Recreation Strategy, e.g. Rail to Trail (SLNCR and Cavan Leitrim Greenway), upgrade walking paths along the Shannon Erne waterway from Leitrim village to Kilclare etc.
2. In the short-medium term, prioritise investment in walks developments where access is not an issue or where land is in state ownership e.g. Waterways Ireland, Coillte, Leitrim County Council
3. Over the medium-long term, continue to implement the recommendations of the Recreation Strategy regarding permissive access agreements to create a centre of excellence for hill walking in the Northern Glens
4. Implement a proactive approach across all key agencies to identify, support and fund new and existing tourism enterprises (community and private) that add value to the walking product such as walking guides, and facilities for walkers in accommodation providers

Cycling

Of the two types of cycling experiences, (on road and off road), off road appeals most to Leitrim's target segments, with on road cycling appealing to a much smaller niche or specialist market.

To position Leitrim as an attractive destination for cycling, family friendly cycling paths should form a key part of development works on the SLNCR, the Cavan Leitrim Greenway, along the Blueway and along the Shannon Erne Waterway.

Consultations with local providers during the research for this strategy identified that the promotion of The Kingfisher Cycle Trail was sub-optimal. However, as much of the trail is on road, its appeal to the family market is very limited. Consequently, any future promotion of the Kingfisher should be targeted at the specialist cyclist.

Recommended actions

1. Implement the actions associated with cycling in the Leitrim Recreation Strategy to ensure multi use trails include off road cycle paths
2. Review the Kingfisher Cycle Trail to identify any critical gaps in the core product that may need investment before embarking on any marketing campaign to specialist cyclists
3. Implement a proactive approach across all key agencies to identify, support and fund new and existing tourism enterprises (community and private) that add value to the cycling product

Lough Rinn rowing facility

The 2,000 meter, eight lane facility capable of hosting international events, as well as acting as a training base for international teams in advance of major competitions, is a unique offering in Leitrim. It offers opportunities to attract high profile audiences who have potential as referral agents to recommend Leitrim as a unique holiday destination. It also offers potential in the corporate market.

The facility can in time, attract large numbers of spectators to events and competitions in the same way as for example, the Volvo Ocean Race attracted several hundred thousands of visitors to Galway while only a tiny portion of them were sailing enthusiasts. Other examples include horse racing and arts festivals, where the majority of attendees are there for the overall experience rather than being attracted by a core interest in the sport or the event itself.

The facility has been launched as phase one of a long term aim to create in Leitrim a world class facility which is a centre of excellence for the development of water sports in Ireland; such a designation represents a critical way to “differentiate Leitrim waters and build on the added value”.

Recommended actions

1. Ensure continued investment to complete the facility to best practice standards and implement a maintenance programme to ensure it can become a centre of excellence for water sports
2. Formalise arrangements re operations, management, promotion and booking of the facility
3. Implement a proactive approach across all key agencies to identify, support and fund new and existing tourism enterprises (community and private) that add value to the Lough Rinn Rowing Facility. This should include, but is not limited to, water sports operators, equipment hire businesses, accommodation, food, guides, heritage interpretation etc.

Adventure tourism

Globally, 90% of adventure tourism is “soft” and 90% of the adventure offering in Ireland is also “soft”. While people may ‘think’ hard adventure in their aspirations around an adventure based holiday, in practice, most engage in soft adventure such as walking, cycling, equestrian and water based activities.

The Baseline Study notes that “Leitrim, with its varied landscape, offers active engagement with people, culture, natural & built heritage. It is ideal for adventure travellers in terms of walking routes, angling, equestrian trails, water based activities, and centre based and multi activity holidays”

Walking, cycling, angling and the Blueway have been examined above. For Leitrim’s other adventure products such as equestrian and water based activities that are not on the Blueway etc, many of the ingredients/physical assets already exist and it is in areas such as capacity building, experience development, and sales and marketing that will bring future success.

Recommended actions

1. Implement the actions associated with adventure tourism in the Leitrim Recreation Strategy
2. Implement a proactive approach across all key agencies to identify, support and fund new and existing tourism enterprises (community and private) that add value to the adventure product. This should include, but is not limited to, water sports operators, equipment hire businesses, equestrian, etc.

Eco tourism

Since the 1970s, Leitrim has been central to the development of organic farming with a high number of organic producers relative to its geographic size. As a result of the Green Box sustainable tourism project, Leitrim had a reputation as the home of sustainable tourism or eco tourism for a number of years. The Green Box delivered Ireland’s first eco tourism destination, headquartered in Leitrim, and between 2006 and 2007 its success was recognised by winning a number of international awards.

Ten years after the launch of the Green Box, various tourism providers and other tourism destinations have eco-tourism certification and eco tourism awards. In recent years, the Burren in county Clare has also been carving out a niche as an eco-tourism destination and it would appear that Leitrim may have lost the market lead it once held as a pioneer in the development of eco tourism.

Leitrim offers a strong cluster of eco tourism products and services, including festivals and events. There is a perfect fit between the natural environment and the expectations and demands of Leitrim’s

target segments – people who are interested in sustainable tourism and environmentally friendly experiences based around walking, cycling, water based activities, and built and landscape heritage experiences.

Stakeholder consultations for this strategy identified a desire to rekindle the eco tourism agenda in Leitrim, underpinned by a belief that the county *can* reclaim its position as a market leader.

Recommended actions

1. Examine the existing eco tourism offering to establish gaps in product / experience offering and explore opportunities around eco labelling for activity providers
2. Support the renewal of the eco tourism network under the overall umbrella of the LTGA
3. Implement a proactive approach across all key agencies to identify, support and fund new and existing tourism enterprises (community and private) that add value to the sustainable tourism product. The Baseline Study notes that the Green Box's "strategy failed to gain support from mainstream agencies"; now is the time to secure that support so that eco tourism can play a key role in delivering on the targets

Diaspora and genealogy

Leitrim has a significant Diaspora. Building on the success of the Gathering in 2013, the Diaspora is to be a key focus for Tourism Ireland in 2015. This represents a good opportunity for Leitrim to capitalise on Tourism Ireland's activities to reach out to its Diaspora.

There are two types of Diaspora; some people are extremely interested in tracing their roots and will invest significant time in finding as much information as possible about their ancestors; others have a passing interest, which will typically be satisfied by simply visiting the home or area of their forefathers.

For those with significant interest, online resources can meet many of their needs, but additional support on the ground in Leitrim will add value to their overall experience. In targeting its Diaspora, it will be critical to ensure that Leitrim's Genealogy services for those who are highly motivated to trace their roots, are sufficiently comprehensive and of scale. This service is currently offered by The Leitrim Genealogy Centre in Ballinamore and the County Library. The ongoing development and enhancement of the Leitrim Roots Festival can be a draw for the Diaspora, as can a programme of supports to help local communities harness and harvest local knowledge and local stories as a resource for the Diaspora.

Recommended actions

1. Examine the current resources of The Leitrim Genealogy Centre and the County Library to ascertain their combined ability to service the current level of demand and to stress test a significant increase in demand from the Leitrim Diaspora in the coming years
2. Identify where additional resources may be required and how they can be delivered to ensure Leitrim can optimise the potential of this niche market, e.g. capacity building to document and record local records, stories etc.
3. Facilitate the development and enhancement of the Leitrim Roots Festival through capacity building and other supports
4. Support local communities to develop and promote annual homecoming events at a person to person or family to family level

Products that add value to the key selling points

Festivals and events

Festivals and events can offer significant potential in terms of adding value to the visitor experience and of stimulating growth in visitor numbers, particularly amongst the domestic market and the Diaspora. Leitrim must build on its strong festival base by prioritising a small number of existing festivals which represent the best potential to grow. Gaps in the calendar for establishing a new festival which can specifically add value to the key selling points should also be examined.

Festivals and events will need ongoing development and marketing funding to become more professional in programming and operation, more business-like in understanding audience profiles and, crucially, more effective at measuring return on investment in terms of additional visitors and economic impact. A good start has been made in this area through the Festival Animation Project commissioned by Leitrim Development Company, but ongoing support is required.

Recommended actions

1. Establish a festivals and events working group to identify festivals' needs in terms of support for funding applications, operational guidance, Health & Safety, marketing and promotion, audience profiling and economic impact analysis. Many voluntary-led festivals and events undertake the same actions annually, with duplication of effort and replication of overheads common. The availability of a central support system could play a crucial role in facilitating growth
2. Identify existing festivals and events which add value to Leitrim's key selling points, and which have the potential to become festivals of scale. Identify gaps in the annual calendar using the same criteria
3. Once a small number of priority festivals have been identified, ensure they receive the funding and soft supports required to become events of scale with clear metrics in place for generating additional visitors

Heritage and culture

Fáilte Ireland defines cultural tourism as encompassing "a wide spectrum of cultural and heritage experiences that generally involve events, festivals, artistic performances, cultural activities, museums and galleries." Leitrim's most visited built heritage site is Parke's Castle: 14,800 visitors in 2012.

Cultural experiences resonate greatly with the Culturally Curious and the Great Escaper who like to engage with the local arts, culture, history and stories in a participative rather than passive manner.

To facilitate customer participation, support for festivals and events, heritage sites, and arts and culture should be prioritised to those associated with important centenaries or commemorations e.g. Seán McDiarmada Summer School, Seán McDiarmada's Cottage, Yeats 2015, Margaret of New Orleans (when timing is appropriate).

Recommended actions

1. Prioritise investment in heritage and culture products that add value to Leitrim's key selling points and bring to life local traditions or relate to Leitrim's famous sons and daughters
2. Identify specific heritage and culture products that have unique time-based opportunities over the lifetime of this strategy e.g. Yeats 2015, opportunities at Fenagh Heritage Centre etc.
3. Devise a programme of 2016 commemorations and develop a legacy visitor experience around Seán MacDiarmada's house in Kiltyclogher, the only remaining original homestead of one of the signatories of the 1916 proclamation
4. Develop experiences around the Arts that help to bring the local vibrant arts assets and community to life

5. Work with Leitrim Heritage Officer and the Heritage Centre in Carrick on Shannon to identify opportunities around heritage

Business tourism

The brief asked that the market potential for business tourism be explored. International business tourism is one of the highest yield sectors in tourism and it has enjoyed an average annual increase of almost 8% since 2011. Of the one million business tourism trips from overseas markets into Ireland in 2013, half originated in Great Britain, Mainland Europe accounted for 36% and the US market for 8%.

Tourism Ireland has stated that growing business tourism will be a key focus in its plans for 2015.

Most large international conferences and events will typically be based in Dublin for capacity reasons, but research indicates that there is always a demand for interesting corporate venues for small meetings and corporate events in destinations outside of Dublin. Many neighbouring counties are bases for multinational companies which need meeting venues for visiting head office management teams.

Anecdotally, there is also a return to growth in the domestic business and conference market. During the recession, companies based in Ireland were unwilling to spend on external venues. However, 2014 saw an increase in demand with companies more willing to use external venues for conferences, meetings, events and team building exercises.

Recommended action

1. Establish a business tourism working group comprising hotels, conference venues and team building providers to explore the potential for business tourism in Leitrim with an initial focus on the domestic market

English language learning

An area of potential demand in European markets is English Language learning. Research shows that approximately 100,000 overseas students study English in Ireland's accredited and approved language schools. An English language school has opened in Drumshanbo catering for this demand.

Given the low level of approved accommodation in certain parts of the county, English language schools, which mainly require home-stay accommodation and local tours, represent a possible good fit.

Recommended action

1. Assess the potential demand and interest at a supplier level to develop this sector

General

A number of essentials must be in place in all tourism destinations:

Accommodation

The Baseline Study identified that just over half of the bed capacity in the county is Fáilte Ireland approved. Leitrim has many unapproved B&B and self-catering properties. Fáilte Ireland and Tourism Ireland offer a range of promotional and sales channels to create visibility and awareness in overseas markets for the trade. Accommodation providers who are not approved automatically disqualify themselves from participating in co-operative campaigns with Tourism Ireland²¹.

In 2015, Fáilte Ireland will launch a new programme focussed on encouraging unapproved providers to enter the system. Details of the new programme have not been finalised, however, it is expected that entry will be less costly and more flexible than the current system. Additionally, a new system is envisaged for accommodation that does not fall under existing categories e.g. glamping and cruising.

There is a shortage of accommodation in parts of north Leitrim. Given the nature of the tourism experience in the area, accommodation such as glamping and other specialist, authentic accommodation will appeal to the target customer. To that end, there may be a case for a carefully thought through developmental approach to market intervention that supports the development of such accommodation.

Recommended actions

1. A proactive, developmental based drive to encourage new and existing accommodation providers to participate in the Fáilte Ireland approvals programme. This will ensure that Leitrim can participate comprehensively in all domestic and overseas marketing campaigns
2. Working group to explore market intervention to encourage additional accommodation in north Leitrim

Food

As an increasingly important part of the holiday experience, food tourism is attracting more attention. Food experiences have a significant impact on the overall holiday satisfaction levels for Leitrim's target segments. In recent years, Leitrim has a growing number of award-winning restaurants and gastro pubs which are gaining a reputation for destination dining - a trend to be encouraged.

Recommended action

1. Programme to encourage greater focus on local specialities and meet the maker opportunities

Way finding and interpretive signage

The Baseline Study noted inconsistencies with signage, and in some areas, a lack of signage. Despite advances in technology, physical signage plays an important role in ensuring the customer is encouraged to travel deeper into the county, to better understand the landscape, history and heritage, thus facilitating longer stays and higher spends.

Recommended actions

1. As noted in the Baseline Study, a detailed audit should be carried out to appraise various types of signs in use and determine strengths and weaknesses of current signage

²¹ Ireland is 2nd most popular tourism board on YouTube, number 3 on Twitter, and no. 4 on Facebook (2.6 m fans)

2. Maintenance and management of signage is as important as any other element of tourism product development and an annual budget should be established for same

Maintenance

Once investment has been made in physical infrastructure or assets, an ongoing maintenance programme is essential to keep the product at world class standard.

Recommended action

1. Include maintenance in annual work programmes and budgets for all products

7. Pillar 3: Experience Development

7.1 Pillar goal

When the tourism strategy is working at its best, all areas of Leitrim will deliver a unique holiday experience built on product, service and story. Across all stakeholders, there is a cohesive, ongoing commitment to developing experiences that create lasting memories. Repeat and referral business will be driven by exceptional delivery on the ground.

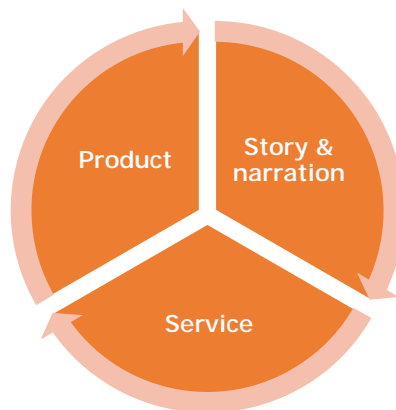
7.2 Experiential tourism

Today's tourists, both domestic and overseas, are well travelled and sophisticated. As a result, many have 'been there, done that', and have little desire to visit a place just to see something new. They want to immerse themselves in a place and enjoy unique experiences that engage the senses and are truly memorable. Rapidly changing visitor expectations mean that the way tourism in an area is developed, marketed and managed has changed; the move away from selling products to selling experiences.

How does today's tourist measure how memorable their holiday is? Not by a checklist of seeing an area's highlights. Instead, enjoyment is measured using reference points such as;

- Spontaneity
- Excitement
- Being together with loved ones
- Discovery
- Once in a lifetime experience
- Getting off the beaten track
- Happiness

Three components make up a memorable tourism experience. All three must be present.



- **Product:** As well as meeting all physical/technical/infrastructural requirements, the product should give the customer the opportunity to get involved, to immerse themselves, to have a go, to try something new. The best examples are world class products with a local twist
- **Service:** In tourism and hospitality, the person who delivers the product to the customer is as important a part of the customer experience as the product itself. Leitrim's friendly people and welcoming communities are a genuine asset to the county's tourism sector and they can deliver a truly authentic and unique service to the visitor
- **Story and narration:** Defining the story and narrating or telling it to the customer, sometimes six months ahead of their holiday, is a key part of the overall experience. The story behind the product e.g. when and why were canals built in Leitrim (the story behind the Blueway), the story about how and why Leitrim has a strong eco culture etc. These stories and the communities behind the stories can help set an experience in Leitrim apart from a competing experience in Dingle or Donegal

7.3 Experience development

The strategy to grow tourism will require the development and delivery of experiences that are built around Leitrim's market ready products and those products with market leading potential. The priority will be to develop experiences in centres of excellence such as Ballinamore as a centre of excellence for angling, Carrick on Shannon as a centre of excellence for cruising and the Blueway as a centre of excellence for water based and land based activities. Over time, North Leitrim has potential to be a centre of excellence for walking, and Manorhamilton for heritage.

Over the life of the strategy, these centres of excellence will become the model for the ongoing development and growth of tourism throughout the county in order to achieve the ambitious growth targets.

7.4 Underlying principles

- Just as products and infrastructural assets are developed, the other components that make up the total experience, (service, story and narration), must get the attention they require. No matter how fantastic the product is; on its own, it will not deliver the experience the customer is looking for. The softer side of the equation - the story and the service - can be just as important, some would argue, even more important than the core product
- Understanding the customer and what they want is the first building block to creating and delivering memorable experiences. How Leitrim develops compelling experiences and sells those experiences to the target customer requires capacity building, collaboration and focus
- Experiences are developed around core products, for example: Leitrim must create experiences around Ireland's first inland blueway, the Northern Glens etc.
- Tourists do not choose a destination based on an individual tourism offering - in successful destinations, familiarisation with the local area, with each other's businesses and experiences, with the stories and culture of the local area are central to the trade's activities
- The customer and the market are continually changing; from how tourists plan and buy their holiday, to what they experience during the holiday and how they share information about it both during and afterwards. Trade and agencies must keep up to date with changing consumer preferences and continually tweak their offering to match expectations
- Storytelling has always been an important part of branding but with the growth in experiential tourism and the power of social media, it's ever more important to be able to communicate the benefits or the experience rather than just describing the product

7.5 Key actions to deliver best practice experiences

1. Extensive ongoing programme of capacity building and supports (collectively and at individual business level) to help tourism businesses create new experiences around their product offering and tailor current experiences that will resonate with the target segments
2. Tourism businesses will need supports to help them tell their individual and collective story before, during and after their customers visit. Doing so will create an emotional connection with customers by intriguing and engaging them
3. Continual, facilitated programme of local familiarisation for tourism businesses
4. Training and development supports for the trade to keep up to date with current marketing thinking and practices

Sample²² Leitrim experience for Great Escapers from Germany

Who are they? A couple from Germany, Paul and Monika are in their mid-30s, with two boys, Karl and Max, both under 10. They're visiting Ireland for some quality time together, and a memorable experience.

Live: Koln, Germany

Occupations: IT Engineer and teacher

What do they want from a holiday? To bond with loved ones, having fun and sharing laughs together during some much-needed downtime. To soak up some natural beauty, breath-taking attractions and outdoors activities that feel far removed from their everyday lives back home. When they think of their holiday, the motivation for where to go is someplace where they can 'escape'. Quality time away from routines and schedules is an important part of their holiday decision. They are juggling busy careers and childcare so they hardly get to see each other from Monday to Friday. Their holiday is their opportunity to find themselves and each other. They have a preference for rural holidays and they want to connect with each other and with nature in a remote and exciting place

DAY 1

Product

Paul and Monika are flying from Koln to Ireland West Airport Knock. They've booked a three-night break and they'll also catch up with Paul's brother and his family (Paul is Irish, but has lived in Germany for 15 years). They pick up their hire car and head off with their two kids, Karl (6) and Max (8) to the self-catering accommodation they've booked in Drumshanbo.

Paul and Monika do lots of their holiday research online but are always influenced by recommendations from their friends. Paul's cousin recommended the cottage, and they booked it after a quick email exchange with the owner – they were very impressed with her friendliness and efficiency. She had also let them know about the local café from where they could order fresh home baking and organic vegetables each day. They were delighted with this as they love to try good local food when on holiday so the local knowledge was useful.

Service

Story

The couple had heard about the new Shannon Blueway from Paul's brother, and arriving at the cottage in their rental car, they're thrilled with the views of the water from the cottage. The owner greets them with a smile, leaving a welcome pack of fresh bread, cheeses and a bottle of wine. The family sit in the garden eating their lunch, soaking up the fresh air. Already, the stress is lifting!

After lunch, Paul and Monika take the kids for a stroll down the local country roads and enjoy a walk by the canal, chilling out in the peaceful, rural countryside. It's just day one, and already they've gotten lashings of fresh air and family time... just what the doctor ordered.

Service

Product

Story

DAY 2

Product

They head off for a drive to explore the lovely quiet, rural landscape – this is perfect for them – they love connecting with nature especially in more remote places. They are well equipped as the cottage owner had kindly offered to download a map of the Northern Glens Trail driving route. They enjoy a lunch of local produce in Kinlough. Over lunch, the friendly waiter recommends a visit to Glencar Waterfall and Parke's Castle. The waiter is a natural storyteller as well as being a mine of information. His stories make the children laugh and they can't wait for the lady in Parke's Castle to put them all into the settle bed together – they've no idea what a settle bed is but can't wait to find out.

Paul feels proud that he can share some of Ireland's history with his family and it's also important for Paul, Monika and the children to feel they are cherishing their time together as a family.

²² Adapted from Fáilte Ireland toolkit.

Later that night, they join Paul's brother and family for dinner in a local restaurant where the owner tells them about a music session taking place in one of the local pubs. It's just what Paul wanted. A genuine Irish experience to share surrounded by his friends and family. The nine-to-five feels very far away indeed!

DAY 3

Paul, Monika and the kids set out early. Why? Paul hasn't been in a canoe for years and cannot wait to show off his moves on the water! Monika has read about the latest craze, paddle boarding, and fancies giving it a go too. They've arranged to meet David, the owner of the water activities business and he has all the gear they need and helps them get set up for a couple of hours of laughs and splashes. When the boys ask him about fishing he says to leave it with him – a quick phone call and he has organised for them to go fishing in the afternoon – catch guaranteed!!

Lunch is an enjoyable picnic on the water's edge, surrounded by tranquillity and birdsong. The fresh baking from the local café is a real treat. Next they head off to Drumkeeran to meet Mick, the fisherman, who has rods and nets and everything they need for the kids' first fishing experience. Max catches a fish and his ear to ear grin is quickly captured on camera and shared on Facebook. He was learning about fishing at school but had no idea he'd catch a fish on his first try.

It feels like ages since they've had this kind of time together – and they're loving every minute. Dinner that evening is a chilled out meal back at the cottage.

When the two boys have nodded off after their day of fresh air, Paul and Monika enjoy a glass of wine and some local artisan cheeses in front of the peat fire.

DAY 4

On their final day, Paul and Monika take the kids on a drive to Ballinamore to visit the folk museum where the history of Max and Karl's great grandparents is brought to life. The children and Monika love the pretend ride on the old motorbikes and the boys particularly enjoy trying on the post man's hats.

Afterwards it's back to Knock. Sitting in the airport, Paul and Monika can't believe how refreshed and recharged they feel. They're already making plans for a return visit.

Product

Story

Service

Product/Service

Story

Product/Story

8. Pillar 4: Collaboration

8.1 Pillar goal

When the tourism strategy is working at its best, everybody involved in tourism in Leitrim, both directly and indirectly, understands its economic importance. This understanding drives real collaboration, communication and sharing.

8.2 Underlying principles

- Developing and agreeing the strategy is the first of many steps; collaboration is the key to its successful implementation. No matter how much effort is input, stakeholders working in isolation will not achieve the results that Leitrim desires. Success requires a collective endeavour. Successful tourism destinations are characterised by stakeholders who work together to achieve a shared goal



- When tourism businesses and local people appreciate the importance of tourism as an economic driver, they are well positioned to understand and deliver the values²³ of the Leitrim tourism brand
- The establishment of the Leitrim Tourism Network has been a very positive development for the local trade and it can play an important role as part of the overall structure to deliver the strategy, primarily through networking, familiarisation and collaborative opportunities
- Good communication at all levels will help build trust. This will require consultation and open communication with local communities and businesses so that they can adopt the tourism strategy, taking a collaborative and participative partnership approach to its implementation
- There are encouraging examples of where Leitrim has demonstrated collaborative energy and drive. Two such examples include the Leitrim Recreation Forum and the success of the county in organising many events for The Gathering. Leitrim Tourism Ltd also achieved progress but its future role will be different. The bottom up, community led approach successfully employed in developing the Leitrim Recreation Strategy can also benefit the work of the Leitrim Tourism Growth Alliance
- Reflecting the fact that tourists do not see or care about county boundaries, collaboration with neighbouring counties is essential for the future
- The LTGA will provide leadership to drive the implementation of the strategy, employing a bottom up approach which has proven to be effective in other networks and working groups in the county
- Underpinning the Leitrim tourism experience is the graciousness and authenticity of the people. Consumer research identified that people are vital in converting the tourist's interaction with the county's natural and built assets into memorable holiday experiences that can drive repeat and referral business. As tourism grows and tourism businesses become busier, it will be essential to protect the principles and values that make the county's people amongst its greatest tourism asset

²³ Brand values: memorable, friendly, warm, intriguing, proud of our heritage, proud of our unspoilt environment.

8.3 Key actions to deliver collaboration

1. Systematic, ongoing programme of open communication and sharing between all stakeholders: Leitrim Tourism Growth Alliance, Leitrim County Council, Leitrim Tourism, Leitrim Recreation Forum, tourism businesses, stakeholders, etc.
2. Capacity building on communications for all stakeholders
3. Information programme with the public to understand Leitrim's tourism story and their vital role in it. As tourism grows it will be critical that such a central component of the Leitrim experience, friendly people, remains a constant
4. Ongoing familiarisation programmes for local tourism trade and for the public so that they are familiar with the experiences available locally and can recommend them to visitors to increase dwell time and, by extension, visitor spend
5. Support ongoing networking, familiarisation and referral between tourism businesses
6. Collaboration, on product and infrastructure as well as marketing and sales, with neighbouring counties, primarily Roscommon, Sligo, Fermanagh and Cavan will help maximise returns from scarce resources
7. Collaboration with all airports to identify specific marketing and promotional opportunities in Leitrim's target markets (Germany, GB and NA)
8. Collaboration with Ireland West Airport Knock specifically to support its efforts in growing routes
9. Investment in ongoing training and development of the people who will create, promote and deliver the Leitrim visitor experience. Requirements will include capacity building in communication, networking, collaboration, experience development, marketing (digital and traditional), sales, customer care and innovation
10. Devise a training programme to shape local people as ambassadors and believers of Leitrim as a tourist destination. Help people recognise the benefits and importance of tourism to the local economy, creating jobs and delivering facilities for an enhanced local environment and quality of life

9. Pillar 5: Marketing and Sales

9.1 Pillar goal

When the tourism strategy is working at its best, the county's cross-platform marketing communications inspire and influence partners and customers. Leitrim is easy to find in the places where customers search. We make it easy for them to decide and buy.

9.2 Underlying principles

- Marketing communications will play a key role in positioning Leitrim as a competitive tourism destination within the Lakelands and Wild Atlantic Way propositions
- Marketing communications reflect multi party commitment to customer centricity, customer led product and infrastructure developments, experience creation and delivery, and collaboration
- Marketing and sales is everybody's responsibility and a layered approach involving all stakeholders – public, private and community is required to increase the county's visibility as a tourism destination
- Marketing plans of public, private and community stakeholders who play a role in delivering experiences are dovetailed and integrated with the county marketing and sales action plan
- Marketing and sales investment is prioritised on communicating the experiences that set Leitrim apart from other destinations in its competitive set
- Marketing communications represent the Leitrim brand, its values, essence and story in a consistent manner across all platforms and across all stakeholders
- Strategic marketing partnerships with tourism agencies and other key stakeholders, including neighbouring counties, are critical to optimising targeted spend and return on investment
- An annual marketing and sales action plan will be updated each year based on previous year's results. KPIs and monitoring of targets are central to this
- All marketing communications are tailored to the needs of the target segments using language, imagery and messaging that will appeal to segment motivations

9.3 Marketing and sales strategy

Once the fundamental building blocks of product and experience development and a customer centric and collaborative approach have been put in place, a successful marketing communications and sales action plan will be implemented.

Marketing communications needs to increase the visibility of Leitrim in the channels where the customer looks when researching their holiday, and the sales opportunities need to be harnessed, both online and offline, to convert "lookers to bookers".

Central to the marketing and sales action plan is the Leitrim brand; internal and external communications and customer experiences across the customer journey must be consistent with the brand story. The marketing communications and sales strategy will be founded on a number of inter connected building blocks – see over:



Strategic marketing partnerships

Long-term strategic marketing partnerships between trade (public, private or community led operators who deliver a tourism experience) and agencies/public bodies who support the delivery of tourism experiences is imperative to drive growth. These partnerships should be proactive and constantly engaged.

For the domestic market, such strategic marketing partnerships will include the trade working with agencies and public bodies who play a role in implementing and delivering the strategy e.g. Leitrim County Council, Leitrim Tourism Ltd, Fáilte Ireland, Waterways Ireland, Inland Fisheries Ireland, Coillte, National Parks and Wildlife Service, as well as local authorities in neighbouring counties.

At an international level, strategic marketing partnerships must be forged with Tourism Ireland (in Dublin, Coleraine and each of the priority overseas markets), inbound and marked-based tour operators, international journalists, social media content generators and airlines/airports.

Recommended actions

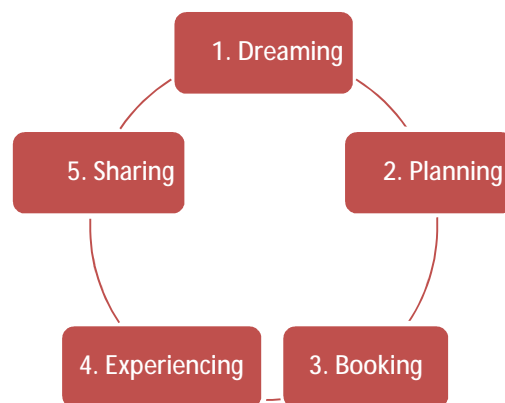
1. Ensure Leitrim is a key player in the Lakelands and Wild Atlantic Way propositions and that an effective relationship with Fáilte Ireland and Tourism Ireland is developed
 - a. Develop relationships with Tourism Ireland trade and publicity management teams in the key overseas markets and in Dublin and Coleraine offices to ensure they are aware of the new Leitrim tourism strategy and can support relationship development with overseas trade and media
 - b. Develop a working relationship with the Fáilte Ireland Business Tourism to explore the potential for business tourism and to build networks for the corporate & incentive markets, where appropriate
2. Develop relationships with offline and online distribution channel partners in Ireland and overseas including inbound tour operators, overseas tour operators, overseas travel agents, online travel agents, incentive and corporate travel partners, destination management companies, professional conference organisers, etc.
3. Develop relationships with large indigenous and multinational businesses in the region to position Leitrim in their minds as a credible location for corporate meetings which offers unique team building and incentive opportunities

4. Continue the strategic partnership with Ireland West Airport Knock to specifically target the GB and German market segments, as well as the Dutch market specifically for angling experiences. Develop relationships with relevant airline and airports

Digital platforms

No tourism destination or experience can achieve visibility amongst its target market without an aggressive digital marketing strategy. Across all target segments, the majority of travel purchases are influenced by digital channels (websites, social media, peer reviews, smartphone or tablet apps) even if the final purchase isn't made online. Holidaymakers will visit an average of 21.6 sites before making a purchase; Online Travel Agents (OTAs) are often consulted during research but the booking made directly with the tourism business. These intermediaries can be a shop window that influences direct sales and represent channels on which Leitrim and the individual tourism providers must have a presence.

To achieve targets, trade and agencies must be at the cutting edge in terms of their digital footprint which impacts on the digital consumer journey at five different stages:



The Google 5 Stages of Travel Model

Recommended actions

Websites & apps

1. Prioritise a new website for Leitrim, accessible from all platforms, that reflects international best practice and SEO²⁴ for the domestic and key international markets
2. Ensure the Leitrim website content (text, imagery, video) is continually updated and relevant
3. Downloadable apps and audio guides which can enhance visitor experiences, encouraging the target customers to travel further into the county should be developed
4. An examination of some individual operator websites undertaken in preparation for this strategy indicates that many need to be upgraded. A number of websites are dated, they do not reflect current trends in website design and customer usability, and links to partner websites are broken or missing. A proactive campaign to upgrade trade websites should be implemented

Social media

1. Work with a specialist social media agency to design and advise on the implementation of a cohesive social media campaign involving relevant stakeholders and relevant content across relevant social media platforms to support experience development and drive visitors to the trade websites to generate sales
2. Monitor Leitrim's online reputation via user generated content on review sites and engage with the online community to share their Leitrim experiences online

²⁴ SEO – Search Engine Optimisation

Direct marketing

1. Implement a policy across stakeholders to capture email addresses from visitors and prospective visitors and develop a segmented consumer database that is categorised by visitors' interest in specific experiences
2. Develop and implement a highly targeted e-mail marketing campaign across the segmented database to drive repeat and referral sales

Image bank

In successful tourism destinations, trade and stakeholders communicate common themes through the use of images, video and marketing messages. A central library of high quality images, video, text and marketing messages should be built and shared by trade and partners so that Leitrim's promotion appeals to the customer's visual needs.

Recommended action

1. Assemble a central library of images, video and text for use by trade, tour operators and media

Print material

Notwithstanding the growth and importance of the online platforms in planning, buying, information sharing etc., there is still a role for print communications. This is particularly relevant when tourists are in a destination and maps, brochures and fliers become important sources of information.

Recommended actions

1. Through the brand guidelines, furnish the trade with information and resources on how best to incorporate the Leitrim story into their own print material
2. Provide guidelines on best practice for print collateral to ensure that the trade are meeting the needs of their target audiences and that print platforms can deliver the desired call to action

Public relations

A proactive approach to telling the Leitrim story through the media for domestic and overseas target markets will be an important element in the marketing communications mix. Media coverage across all platforms doesn't just happen, it needs to be orchestrated through a comprehensive and targeted PR action plan.

Recommended actions

1. For the **local market**, implement a consistent publicity campaign that tells the economic story of tourism in Leitrim and invites the public and non-tourism related businesses to play their part in growing tourism in the county
2. For the **domestic market**, implement an annual consumer-facing publicity campaign highlighting Leitrim's experiences across the print and broadcast media and online platforms that are relevant to the target segments
3. For **overseas markets**,
 - a. Develop a publicity campaign primarily in partnership with Tourism Ireland who have relationships with 22,000 media contacts worldwide
 - b. Develop direct relationships with overseas media who visit Leitrim on Tourism Ireland familiarisation trips and maintain contact with them
 - c. Undertake an annual review of guidebooks and maintain contact with editors to ensure details are up to date
4. Identify and engage with domestic and international travel bloggers who influence target segments

Trade & consumer promotions

A critical element of any tourism destination's marketing strategy is the opportunity to meet with trade partners and potential customers face-to-face. A number of consumer and trade promotions take place in Ireland and overseas markets each year. It is impossible for any tourism provider or destination to participate in all, but Leitrim must have a presence at the main events to meet niche tour operators who are interested in adventure tourism, eco tourism, angling, genealogy and general holidays in Irish destinations which are off the beaten track. That presence can be at two levels: (1) at a destination marketing level led by Leitrim Tourism; (2) at an individual operator level. As with all other marketing expenditure, it will be imperative to have KPIs in place prior to committing to such events so that return on investment can be measured.

Recommended actions

1. Participate in trade workshops and trade fairs in Ireland and overseas markets with a focus on developing relationships with niche tour operators (both at a destination level and at an operator level)
2. Identify consumer fairs that represent potential for Leitrim's experiences
3. Partner with Tourism Ireland on opportunities for ongoing trade initiatives in overseas markets including: e-zines, co-operative marketing campaigns, direct marketing, business tourism, familiarisation visits etc. Many of these opportunities are free but require a commitment to planning and co-operation between trade and agencies
4. Undertake sales meetings with Meetings, Incentive, Conference & Events (MICE) organisers
5. Develop a segmented trade database for each market and implement targeted e-mail campaigns to keep partners informed and help drive repeat and referral trade sales

Advertising

Advertising is expensive and unless the return on investment can be measured with a reasonable degree of accuracy, it is difficult to recommend that scarce resources be allocated to an advertising budget in the early years of the tourism strategy. Advertising spend will only be optimised when the corner stones of the strategy are firmly in place and Leitrim can be confident the brand promise is being delivered by all stakeholders across all aspects of the consumer journey.

Recommended action

1. Any advertising undertaken should include a strong call to action to convert interest to bookings

Distribution channels

The final link in the marketing and sales strategy is the most critical and often the juncture at which tourism providers are least effective. The purpose of marketing is to raise awareness and facilitate decision making for customers. Closing the sale is the ultimate KPI of all the activity outlined in the previous steps in this section.

Within the mix of distribution channels, it is important to note that just 17% of all international holidaymakers to Ireland are on a package²⁵ holiday purchased from a tour operator. The remaining 83% make their own travel arrangements with the key sources of information being recommendations from friends and relatives, the internet and travel guidebooks. Of the 17% who do come on a package, only around 300,000 people come on a coach tour. 80% of coach holidaymakers are on their first trip to Ireland compared to 63% of all overseas holidaymakers.

Going forward, the potential for Leitrim lies mainly in targeting international holidaymakers directly, through niche tour operators and online travel intermediaries (OTAs etc).

²⁵ Package = prepared an inclusive price for fares to/from Ireland and at least one other element of the holiday.

Recommended actions

1. Stakeholders must have a clear understanding of which trade (leisure and business) partners deliver business, and relationships with those trade partners and referral agents should be optimised
2. Ensure sales interfacing opportunities are operating to maximum efficiency to optimise sales conversions e.g. website is optimised to drive and convert sales, sales interfacing personnel are trained and skilled in sales conversion and up-selling, all stakeholders are familiar with the Leitrim story and key experiences and are skilled at promoting referral sales
3. Tourism businesses need to be focussed on driving repeat and referral business from consumers through an ongoing customer relationship management (CRM) programme
4. Sales analysis should be used to identify best performing trade partners and best performing consumer driven marketing communications
5. Trade partners and marketing communications need to be reviewed and adjusted annually to eliminate underperformance as necessary

Market research

Fundamental to adopting a customer centric approach is the importance of knowing the customer intimately. The low response to the trade research in the Baseline Study demonstrates a lack of appreciation in relation to the importance of market and customer research.

It is imperative that market research forms a core part of this strategy. This means that market research must be undertaken annually at a general county level and also at an individual operator level. In any industry there is a constant state of change; customers change, competitors change and the environment in which we operate changes. If Leitrim does not have a clear understanding of that changing landscape, it will be difficult to compete and impossible to win.

Recommended actions

1. Implement an annual programme of quantitative (surveys online and offline) and qualitative research (focus groups) at a county level through the LTGA (undertaken in-house following capacity building)
2. Individual operators must commit to undertaking quantitative analysis of their customer base via surveys or comment cards annually (undertaken in-house following capacity building). This does not need to include every single operator, but it is important that the trade who service the majority of tourists in the county participate (80:20 principle)
3. Trade providers to quantify jobs created and supported and to track this over time
4. It will also be critical for festivals and events to quantify and profile their audiences
5. Annual research findings should be circulated to stakeholders to inform everybody about KPIs and results relative to targets and to inform decision making for subsequent years

10. Pillar 6: Governance and Structure

10.1 Pillar goal

Delivery of the strategy is driven by a shared desire for success. Leitrim Tourism Growth Alliance (LTGA) leads the implementation of the strategy in collaboration with working groups and stakeholders.

10.2 Underlying principles

- The Draft National Tourism Policy cites an “enhanced role for Local Authorities...” who “... will lead the management of their respective tourism destination and the development of the tourism experience in their areas”
- Under a new²⁶ agreement between Fáilte Ireland and Enterprise Ireland, supports for start-up and small tourism enterprises are now available through Local Enterprise Offices
- The next RDP 2014-2020 (LEADER) fund is due in 2015 and will provide support to build on the success of the previous programme and add value to existing projects, enterprises, initiatives and new innovative tourism business
- Fáilte Ireland will launch a capital investment programme in 2016 that will focus on the Lakelands and Wild Atlantic Way propositions and the development of experiences around them
- Cross border funds will be accessed where possible
- The LTGA and its working groups will be given adequate administrative supports

10.3 Proposed structure

The LTGA was established by Leitrim County Council as a basis for effective collaboration between all stakeholders in the county’s tourism sector. Membership is made up of representatives from the various agencies, elected members and trade providers.

The LTGA and working groups will lead the implementation of this strategy. Underneath the working groups, various activation teams or project teams will be established at appropriate stages to deliver on specific projects around marketing, product development or festivals, e.g. an activation team of adventure operators to develop adventure experiences around the Shannon Blueway, an activation team to specifically look at market intervention around accommodation in north Leitrim.

Working group	Notes
Oversight	<ul style="list-style-type: none"> • Compliance with the strategy • Monitoring performance and targets • Respond to changes in circumstances
Marketing	<ul style="list-style-type: none"> • Guardians of the Leitrim brand • Maximise the county’s promotional activity through the coordination of marketing and PR efforts across all partners • Capacity building
Product development	<ul style="list-style-type: none"> • Drive the delivery of investment in products • Collaboration with Recreation Forum • Identify funding sources for product/infrastructure development • Develop experiences to bring product/infrastructure assets to a market ready position • Capacity building around experience development
Festivals and events	<ul style="list-style-type: none"> • Coordinate funding opportunities • Maintain centralised calendar of events • Provide particular assistance and supports to a targeted number of festivals/events that have the potential to become festivals/events of scale • Capacity building

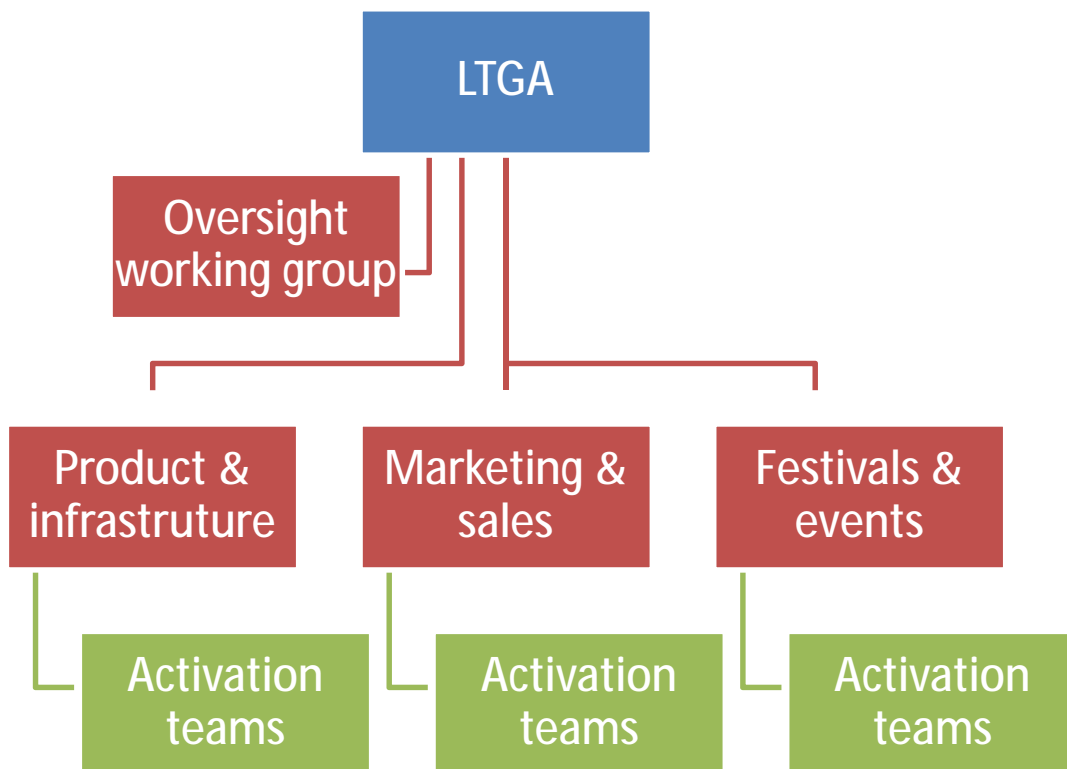
²⁶ December 2014

Proposed structure

The LTGA will be supported by 4 working groups:

1. Oversight
2. Product and infrastructure
3. Marketing and sales
4. Festivals and events

The working groups will establish various activation teams or project teams to deliver on specific marketing, product or festival projects.



Consultation and communication across all stakeholders will be a core feature of the implementation of this strategy.

11. Action Plan

Implementation of the action plan will be driven by the LTGA and its members. The Alliance will also identify funding sources to meet implementation costs. The action plan below should be read in conjunction with the body of the report, where actions are explained in more detail.

Priority actions for 2015

Priority actions for 2015		Key actors	KPI ²⁷
1. Capacity building, networking & collaboration	<p>Training</p> <p>1.1 Implement tailored training programmes:</p> <ul style="list-style-type: none"> - Customer care - Communications - Networking and collaboration - Marketing (digital and traditional) & sales - Customer research – how to gather and use customer information - Experience development - Delivering the brand promise - Innovation 	Trade, LEO, LDC, FI	Stakeholders operate to maximum potential
	<p>Networking and familiarisation</p> <p>1.2 Develop calendar of networking and familiarisation events for tourism businesses</p>	Trade	Open communication
	<p>Trade websites</p> <p>1.3 Support upgrade of trade websites</p>	LEO, LDC, FI	Digital footprint optimised, online visibility enhanced
	<p>Local buy in</p> <p>1.4 Use PR and direct communication to launch new strategy and inform local trade about new structures and governance</p>	LTGA, LCC/LT, Trade	Locals buy into importance of tourism and deliver brand promise
	<p>1.5 Local communications campaign to tell the economic story of tourism in Leitrim including job creation and delivering facilities that enhance local environment and quality of life</p>	LTGA, LEO	Locals and communities buy into importance of tourism and deliver brand promise
	<p>1.6 Devise programme to shape local people, including those not directly involved in tourism, as ambassadors and believers of Leitrim as a tourist destination</p>	Trade, LTGA, LCC/LT, LEO, LDC	Local appreciation of tourism as a key economic driver

²⁷ KPI = Key performance indicators.

Priority actions for 2015		Key actors	KPI ²⁷
2. Product and experience development	<p>General</p> <p>2.1 Develop experiences tailored to target segments to bring Leitrim's products to life</p> <p>2.2 Facilitate programme of familiarisation for trade</p> <p>2.3 Implement a proactive approach across all agencies to identify, support and fund new and existing tourism enterprises (community and private) that add value to the products</p>	Trade, LTGA, LCC/LT, LEO, LDC, FI, WI	Comprehensive experience offering understood by all stakeholders
	<p>Blueway</p> <p>2.4 Prioritise investment in all stretches of the Blueway to complete multi use, family friendly facilities</p>	WI, FI	Shannon Blueway completed and first mover advantage secured
	2.5 Fund new and existing tourism enterprises (community & private) to add value to Blueway	LEO, LDC	Increase in number and quality of service providers
	<p>Northern Glens</p> <p>2.6 Identify value added product to optimise the Northern Glens experience with the Wild Atlantic Salmon prioritised</p>	Trade, LTGA, FI, LEO, LDC, RF, LCC/LT	Visitor experience tailored to segments and proposition
	2.7 Prioritise investment in value added products, way-finding and landscape interpretation for Northern Glens	LCC/LT, LEO, LDC	Visitor experience tailored to segments and proposition
	<p>Cruising</p> <p>2.8 Develop 'off the water' experiences that appeal to German cruising market in collaboration with cruise hire companies</p>	Trade, LTGA, WI, FI, TI, IWAK, LCC/LT	Growth in share of German cruising market, enhanced visitor experience, high customer satisfaction ratings
	<p>Angling</p> <p>2.9 Implement angling actions from the Leitrim Recreation Strategy</p>	LCC/LT, RF, IFI, Trade, WI	Enhanced product and customer experience
	2.10 Prioritise investment in angling to bring Leitrim to centre of excellence standard based on recommendations of IFI <i>National Angling Development Plan</i>	Trade, IFI, LCC/LT, LDC, LEO, RF, WI	Reputation as one of Ireland's angling centres of excellence
	2.11 Consult IFI <i>Economic Impacts of Angling Events in Ireland</i> report to identify high profile angling events/competitions suitable for investment in Leitrim	Trade, IFI, LCC/LT, LDC, RF, FI, WI	High profile annual competition established to reaffirm market leading position
	2.12 Identify value added product that will optimise the angling experience and invest in same	Trade, IFI, LCC/LT, LDC, LEO, RF, WI	Increase in number and quality of service providers
<p>Walking</p> <p>2.13 Implement walking actions from the Leitrim Recreation Strategy including actions around exploring permissive access agreements where relevant</p>	LCC/LT, RF, FI, LDC, Trade, Communities	New walks developed	

Priority actions for 2015		Key actors	KPI ²⁷
3 Product and experience development (cont)	Walking (cont) 2.14 Continue work on feasibility and screening studies for rail to trail projects (SLNCR and Cavan Leitrim Greenway) as future priority projects of significant potential and impact	LCC/LT, LDC, RF	Studies completed and projects moving towards planning
	Cycling 2.15 Implement cycling actions from LRS to ensure multi use trails include off road cycle paths	Trade, LCC/LT, RF, LDC, FI	New off road family friendly cycle paths
	2.16 Review Kingfisher Cycle Trail to identify any critical gaps in the core product	Trade, LCC/LT, RF, LDC, FI	Clarity around market readiness and potential
	Lough Rinn Rowing Facility 2.17 Formalise arrangements re operations, booking, promotion and management of rowing facility	LCC/LT, Trade	Clarity on ownership and responsibilities
	Eco tourism 2.18 Start review of eco tourism offering to identify gaps & explore eco labelling for activity providers	Trade, LCC/LT, FI	Clarity around market readiness
	Adventure Tourism 2.19 Implement the actions associated with adventure tourism in the Leitrim Recreation Strategy	Trade, LCC/LT, RF, LDC, FI	Enhanced adventure product offering
	Diaspora and genealogy 2.20 Stress test resources of Leitrim Genealogy Centre in the context of increasing Diaspora numbers	LTGA, Heritage Group, LCC	Clarity re ability to satisfy demand
	2.21 Support local communities to harness and harvest local stories and knowledge	LDC, Communities, LCC	Enhanced experience for Disapora
	Festivals and events 2.22 Identify festivals/events with potential to grow	LTGA, LDC, LEO, FI, LCC/LT, Communities, other agencies ²⁸	2-3 flagship festivals/events of scale developed
	Heritage and culture 2.23 Support heritage & culture products re timed opportunities. Priority: 2016 with legacy project	LTGA, LDC, LEO, LCC/LT	Compelling experiences to optimise potential at key times
	Accommodation 2.24 Encourage new & existing accommodation to participate in Fáilte Ireland approvals programme	Trade, LTGA, FI	Increased number of approved providers Access to TI & FI supports and programmes
	Accommodation (cont) 2.25 Explore market intervention options to encourage more accommodation in north Leitrim that appeals to the target customer	LTGA, LDC, LEO, FI, LCC/LT	Increased accommodation stock

²⁸ Range of agency involvement will depend on festival theme e.g. arts & culture, heritage, adventure etc.

Priority actions for 2015		Key actors	KPI ²⁷
3. Marketing and sales	<p>Brand identify</p> <p>3.1 Make decision on whether to refresh Leitrim logo to reflect brand promise and experience</p> <p>3.2 Use brand identity for all holidaymaker and diaspora communications</p> <p>3.3 Integrate brand identity with trade and consumer marketing communications</p> <p>3.4 Draw up guidelines, and encourage trade who sign up to them to use it in their promotion</p>	LTGA, LCC/LT	Consistency in brand communication
	<p>Library of images, text and video</p> <p>3.5 Develop central library of images, video and marketing messages for use by trade and partners</p>	LTGA, LCC/LT, Trade	Consistency in brand communication
	<p>Digital marketing</p> <p>3.6 New website including SEO & Social Media strategy with support of external specialist agency</p> <p>3.7 Explore opportunities for downloadable apps and audio guides</p>	LTGA, LCC/LT	Leitrim's digital footprint optimised, online visibility enhanced
	<p>Strategic partnership re access</p> <p>3.8 Work with airports/airlines/market based tour operators to capitalise on current. Continue strategic partnership with Ireland West Airport Knock to target new routes</p>	LTGA, LCC/LT, FI, TI, Trade, IWAK, TOs	Growth in visitor numbers accessing Leitrim via Knock
	<p>Partnerships with agencies</p> <p>3.9 Manage relationships with marketing offices in key agencies i.e. Fáilte Ireland, Tourism Ireland, Waterways Ireland, Inland Fisheries Ireland</p>	LTGA, LCC/LT, Trade	Leitrim central to FI decision making around Lakelands & WAW
	<p>Domestic PR</p> <p>3.10 Maximise added value through coordinated efforts of a domestic PR campaign by all partners</p>	LTGA, LCC/LT, Trade	Visibility in national media increased
	<p>International PR</p> <p>3.11 Develop trade & PR collaboration in partnership with Tourism Ireland in overseas markets</p>	LTGA, LCC/LT, Trade	Visibility in international media increased
	<p>Market research</p> <p>3.12 Implement annual programme of customer research at county level and at operator level</p>	LTGA, LCC/LT, Trade	Enhanced understanding of customer
	<p>Trade and consumer promotions</p> <p>3.13 Relationship building and sales calls with specialist tour operators in Ireland</p>	LCC/LT	More TO programmes featuring Leitrim
	<p>3.14 Relationship building and sales calls with specialist tour operators in Ireland</p>	Trade	Additional sales at operator level
	<p>3.15 Attend ITOA and Meitheal workshops</p>	LCC/LT	More TO programmes featuring Leitrim
	<p>3.16 Attend ITOA and Meitheal workshops</p>	Trade	Additional sales at operator level
	<p>3.17 Identify relevant consumer promotions/fairs and angling fairs</p>	Trade, LCC/LT	Contact details for database

Legend

All Stakeholders:	All agencies and trade	LRS:	Leitrim Recreation Strategy
Coillte:	Coillte	LT:	Leitrim Tourism
FI:	Fáilte Ireland	LTGA:	Leitrim Tourism Growth Alliance
IFI:	Inland Fisheries Ireland	RF:	Leitrim Recreation Forum and relevant working groups
IWAK:	Ireland West Airport Knock	TI:	Tourism Ireland
LCC:	Leitrim County Council	Trade:	Tourism businesses, Leitrim Tourism Network, trade associations and community groups
LDC:	Leitrim Development Company	WI:	Waterways Ireland
LEO:	Local Enterprise Office		

Action plan 2016-2021

	Timing	Actions 2016-2021	Key actors	KPI
Capacity building, networking & collaboration	Annual	Facilitated programme of product and experience familiarisation for stakeholders and trade	LTGA, LCC/LT, LEO, LDC, FI, Trade	Awareness and familiarisation with experience offering
	Annual	Remind people about the benefits and importance of tourism to local economy Ongoing programme to shape local people, including those not directly involved in tourism, as ambassadors and believers of Leitrim as a tourist destination	Trade, LTGA, LCC/LT, LEO, LDC,	Local appreciation of tourism as a key economic driver
	Annual	Ongoing calendar of networking events for tourism businesses	Trade	Open communication between all stakeholders
	Annual	Systematic, ongoing programme of communication and sharing between all stakeholders: Leitrim Tourism Growth Alliance, Leitrim Tourism, Leitrim Recreation Forum, tourism businesses, stakeholders, etc.	All stakeholders	Total buy-in to vision and strategy
	Annual	Maximise resources through collaboration on product, infrastructure, marketing and sales with neighbouring counties; Roscommon, Sligo, Fermanagh and Cavan	Stakeholders	Increased awareness of region
	Annual	Ongoing development of experiences tailored to target segments to bring Leitrim's products to life	LTGA, LCC/LT, LEO, LDC, FI, Trade	Experience offering understood by stakeholders
	2016	Facilitate programme of familiarisation for local public via discovery days	Trade, LTGA, LCC/LT, LEO, LDC, FI, WI	Leitrim experience understood by local public

	Timing	Actions 2016-2021	Key actors	KPI
Product and experience development	Annual	Maintenance on all stretches of the Blueway	WI	Visitor satisfaction ratings
	Annual	Fund new and existing tourism enterprises (community and private) that add value to the Shannon Blueway	LEO, LDC	Increase in number and quality of service providers
	2016	Complete Lough Rinn rowing facility	LCC, Other	Facility completed to world-class standard
	2016 ongoing	Identify value added product that will optimise the Lough Rinn rowing facility experience and invest in same	Trade, LCC/LT, FI, RF	Increase in number and quality of trade
	Annual	Identify value added product that will optimise the adventure (walking, cycling, water) experience and invest in same	Trade, IFI, LCC/LT, LDC, LEO,RF, FI, WI	Increase in number and quality of service providers
	Annual	Prioritise investment in walks developments where access is not an issue or where land is in state ownership and progress works regarding permissive access agreements	LCC, WI, Coillte, RF	Opportunities for visitor walking-based experience enhanced
	From 2016	Submit planning for development of SLNCR and Cavan Leitrim rail-to-trail projects (Dependent on resources and outcomes of screening/feasibility study process)	Trade, LCC, RF, neighbouring LAs, FI	Leitrim can compete directly with other greenway destinations
	2016	Develop an action plan for eco tourism opportunities	Trade, LTGA, LDC	Regain market leading potential
	2016 ongoing	Identify value added product that will optimise eco tourism experience and invest in same	Trade, LCC/LT, LDC, LEO, FI	Increase in number and quality of service providers
	Annual	Support local communities to develop and promote home coming events	Communities, LDC, LCC/LT	Additional experiences for the Diaspora
Annual	Support festivals/events with potential to grow	LTGA, LDC, LEO, LCC/LT, FI, Communities, Other Agencies ²⁹	Additional flagship festivals/events of scale developed	

²⁹ Range of agency involvement will depend on festival theme e.g. could be related to arts and culture, heritage, adventure etc.

	Timing	Actions 2016-2021	Key actors	KPI
Product and experience development	2016	Support heritage and culture products that have unique time-based opportunities e.g. 2016 commemorations and legacy project for same Develop arts experiences to bring the local vibrant arts assets to life	LTGA, LDC, LEO, LCC/LT	Compelling experiences in place to optimise potential
	Annual	Investment in way-finding and landscape interpretation along driving routes	LCC	Enhanced visitor experiences
	2016	Establish business tourism activation team to target conference and meetings market	Trade	Team focused on growing business tourism
	Ongoing	Encourage new and existing accommodation providers to participate in Fáilte Ireland approvals programme and explore possible market intervention to develop new accommodation where gaps exist	Trade, FI, LDC, LEO, LTGA, LCC/LT	Increased number of approved providers Access to FI and TI supports and channels
	2016	Programme to encourage greater focus on food tourism	Trade, LTGA, FI, Food producers	Leitrim's reputation as a food tourism destination enhanced
	Annual	Invest in maintenance and management of signage, trails, litter management	LCC, LDC, WI	Increasing annual customer satisfaction levels
Marketing & Sales	Annual	Ensure brand identity fully integrated with all trade and consumer marketing communications, collectively and at trade level	LTGA, LCC/LT, Trade	Consistency in brand communication
	Annual	Manage effective relationship with marketing offices; Fáilte Ireland, Tourism Ireland, Waterways Ireland, Inland Fisheries Ireland	LTGA, LCC/LT, Trade	Leitrim central to agency decision making, capacity building and marketing around Lakelands and WAW
	Annual	Relationship management with offline and online distribution channels	LCC/LT, Trade	Routes to market optimised
	2016 ongoing	Develop relationship with Meet in Ireland and large indigenous and multinational businesses in the region to grow business tourism	Business Tourism Activation Team	Opportunities for business tourism clarified
	Annual	Support upgrade of tourism provider websites	LEO, LDC, FI	Leitrim's digital footprint is optimised, online visibility enhanced
	Annual	Monitor Leitrim's online reputation	LTGA, LCC/LT, Trade	Customer feedback and satisfaction levels

	Timing	Actions 2016-2021	Key actors	KPI
Marketing & Sales	Annual	Direct marketing policy across stakeholders for trade and consumer relationships	LTGA, LCC/LT, Trade	Growing database of customers with potential for repeat and referral business
	Annual	Consumer-facing publicity campaign for domestic market	LTGA, LCC/LT, Trade	Visibility of Leitrim in national media increased
	Annual	Trade and publicity campaign primarily in partnership with Tourism Ireland for overseas markets – includes guidebooks and bloggers	Trade, LTGA, LCC/LT	Visibility of Leitrim in international media increased
	Annual	Participate in niche tour operator trade workshops and trade fairs in Ireland and overseas	LCC/LT	Visibility of Leitrim in international markets increased
	Annual	Participate in niche tour operator trade workshops and trade fairs in Ireland and overseas	Trade	Increased sales from tour operators
	Annual	Review and attend relevant consumer fairs that represent potential for Leitrim's experiences	LCC/LT, Trade	Increased visibility of Leitrim in domestic and international markets
	Annual	Nurture a culture of KPIs, sales analysis and return on investment	Trade, LTGA, LCC/LT	All marketing and sales activities are measured for impact
	Annual	Annual programme of quantitative and qualitative research at a county level through LTGA and at operator level	Trade, LTGA, LCC/LT	Enhanced understanding of customer and satisfaction levels
	Annual	Circulate market research findings to stakeholders to inform about KPIs, results relative to targets, and to guide future decision making	Trade, LTGA, LCC/LT	Stakeholders understand impact of strategy

Legend

All Stakeholders: All agencies and trade	LRS: Leitrim Recreation Strategy
Coillte: Coillte	LT: Leitrim Tourism
FI: Fáilte Ireland	LTGA: Leitrim Tourism Growth Alliance
IFI: Inland Fisheries Ireland	RF: Leitrim Recreation Forum and relevant working groups
IWAK: Ireland West Airport Knock	TI: Tourism Ireland
LCC: Leitrim County Council	Trade: Tourism businesses, Leitrim Tourism Network, trade associations and community groups
LDC: Leitrim Development Company	WI: Waterways Ireland
LEO: Local Enterprise Office	

Appendices

Consultation, meetings and written submissions

In formulating this strategy, a series of meetings and focus groups were held. Written submissions were also received from tourism stakeholders.

One to one meetings

Organisation	Name	Date
Fáilte Ireland	Fiona Monaghan	14 th November
Inland Fisheries	Suzanne Campion	10 th November
Leitrim County Council	Frank Curran	Various dates
Leitrim County Council	Joseph Gilhooly	Various dates
Leitrim County Council	Vincent Dwyer	Various dates
Leitrim Development Company	Brian Smyth	6 th November
Leitrim Tourism	Sinead McDermott	Various dates
Local Enterprise Office	Joe Lowe	6 th November
Waterways Ireland	Eanna Rowe	6 th November

Group meetings/focus groups/presentations

Organisation	Date
Consumer focus group - Dublin	25 th September 2014
Consumer focus group - Galway	30 th September 2014
Leitrim Tourism Growth Alliance	2 nd October 2014
Leitrim Tourism Network	15 th October 2014
Trade focus group - Manorhamilton	17 th November 2014
Trade focus group - Carrick on Shannon	18 th November 2014
Trade focus group - Ballinamore	18 th November 2014
Leitrim Recreation Forum	21 st November 2014
Leitrim Tourism Growth Alliance	27 th November 2014
Leitrim Tourism Growth Alliance	22 nd January 2015

Leitrim Tourism Network, Drumshanbo, 16th October 2014

Name	Business
Mary C Dolan	Carrick on Shannon Heritage Group
JJ O'Hara	Castle View B&B
Mary McInerney	Lovely Leitrim Barge
Karen McManus	Moorlands Equestrian Centre & Lough Allen Hotel
Julie Callaghan	The Old Rectory
Teresa Lennon	Fenagh Visitor Centre
Tina Pommer	Leitrim Landscape Guided Walks
Michael Davis	Leitrim Quay
Eileen Gibbons	Electric Bike Trails
Clement Gaffney	Kilronan Castle
Michelle Coughlan	Kilronan Castle
Zoë Dunne	Leitrim Surf Co
Lee Guckian	Leitrim Surf Co

Trade focus group, Manorhamilton, 17th November 2014

Name	Business
Tony Daly	Manorhamilton Castle
Pat Fox	Kiltyclogher Holiday Centre/Sean MacDiarmada Summer School
Andy Hallewell	The Organic Centre
Nuala McNulty	Tawnylust Lodge
Kathleen & Aiden Meehan	Bluebell B&B
Noeleen Tyrrell	Ardnahoo
Graham Robertson	Adventure Gently
Mary McCormick	Drumkeeran Holiday Homes
Kevin Currid	Lough Allen Adventure
JJ O'Hara	Castlevue B & B
Felim Gurn	Councillor

Trade focus group, Carrick on Shannon, 18th November 2014

Name	Business
Pamela Ruddy	Moonriver
Charlotte Fearon	Aisleigh Guest House
John Bredin	St. George's Visitor & Heritage Centre
Geraldine Grey	Leitrim Design House
Ruth Conlon	Lough Rynn Castle Estate & Gardens
Ciaran Kelly	Landmark Hotel
Joe Dolan	The Bush Hotel

Trade focus group, Ballinamore, 18th November 2014

Name	Business
Terry Shortt	Short's Heritage Bar
Teresa Kennedy	Glenview B&B & Museum
Helen Corcoran	Margaret of New Orleans
Brian McKeon	McKeon Self Catering
Janette McManus	Buille Toll B&B
Monica Sharpley	Old Mill Town House
Patricia McCartin	Leitrim Genealogy
Gabriel Owens	The Forge Tackle & Bait Shop
Dee Owens	The Forge Tackle and Bait Shop
Damien Hamill	Hamill's Guesthouse
Ciaran Smith	Smyth's Bar & Restaurant
Patrick Curran	The Old Rectory/Fenagh Visitor Centre

Written submissions

Written submissions were received from:

Ard Nahoo

Carrick on Shannon Heritage Group

Councillor Felim Gurn

Electric Bike Trails

Gerry D'Arcy

Julie Callaghan

Leitrim Design House

Leitrim Development Company

Leitrim Tourism Network

Liam Scollan

Lough Rynn Castle

Publications reviewed

The following publications were reviewed:

Accommodation capacity by county, Fáilte Ireland, 2013

Baseline analysis and recommendations for the future of the tourism sector in Leitrim, Leitrim Development Company, 2012

Coach Tourism 2012, Fáilte Ireland, November 2013

Developing Leitrim's Tourism Potential 2007-2013, June 2007

Draft Leitrim County Development Plan 2015-2021, January 2014

Draft National Tourism Policy for Ireland, Department of Transport, Tourism and Sport, July 2014

Economic Strategy – Background Paper to Leitrim County Development Plan 2015-2021, EMcG Solutions and Leitrim County Council, November 2013

Hotel Review, Fáilte Ireland, 2012

Lakelands & Inland Waterways Strategic Pan 2010-2015, Waterways Ireland

Lakelands and Inland Waterways Strategic Plan, Mid Term Review 2013-2016, Waterways Ireland

Leitrim Festival Animator Project, Leitrim Development Company, 2012

Leitrim Recreation Strategy, Leitrim Development Company, 2014

Lough Allen Catchment Plan, Leitrim County Council, 2008

Manager's Report on Submissions, Consultations and Public Meetings to Draft Leitrim County Development Plan 2015-2021, June 2014

Marketing Strategy 2012-2017, Waterways Ireland

Overseas visitors to counties, 2009-2012, Fáilte Ireland

Regional tourism performance in 2013, Fáilte Ireland, October 2014

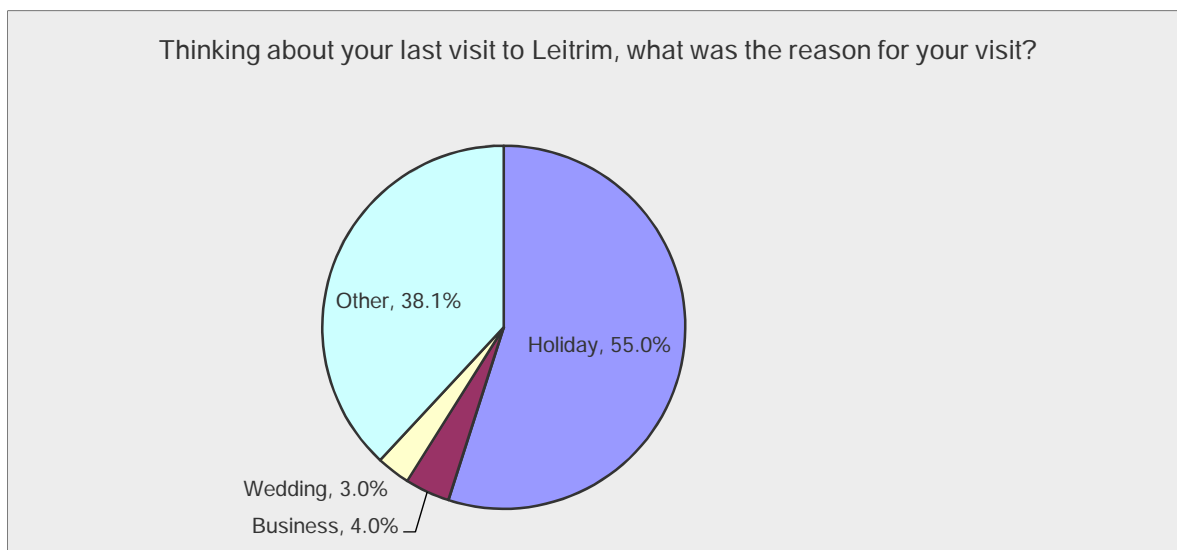
Tourism Facts 2013, Fáilte Ireland, August 2014

Consumer research

Consumer survey – quantitative research

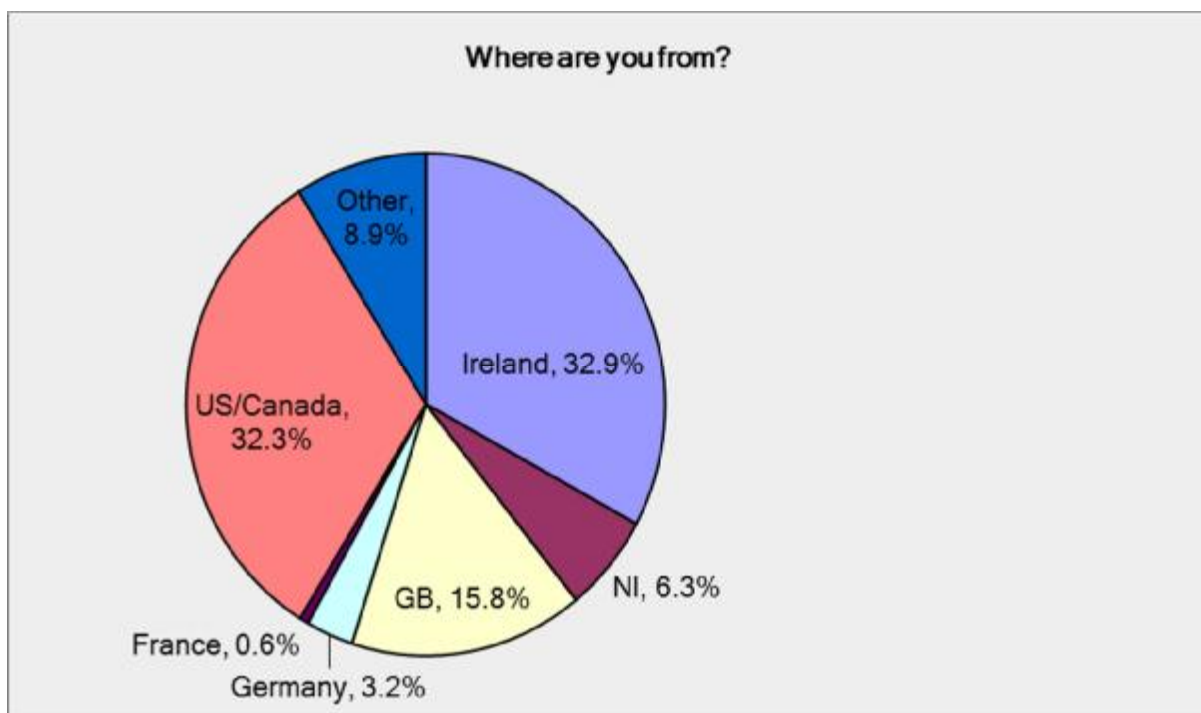
200 consumer surveys were completed; 151 online and 49 in Carrick on Shannon Tourist Information Office. The online survey was mailed to the Leitrim Tourism consumer database and posted on its Facebook and Twitter pages.

Reason for visit



- Over half were on holiday
- Of those who said 'other', almost 80% were visiting friends and relations (VFR) or tracing roots

Where are people from

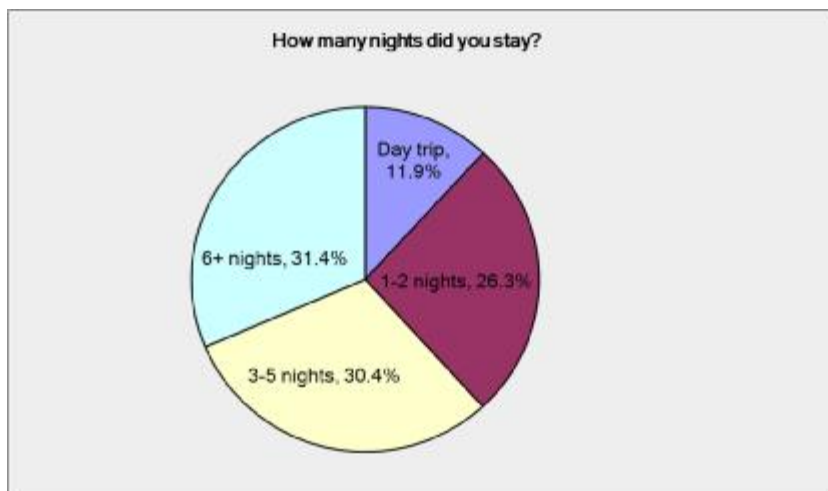


- Of those from Ireland, just under half are from Dublin, and the remainder from places such as Cork, Kildare, Donegal, Sligo and Tipperary

First visit

- For 36%, it was a first visit
- Among international visitors, the 'first visit' figure was higher at 44% but a noticeable 55% of international visitors were repeat. This profile is quite different to the national picture where 63% of overseas holidaymakers are on a first visit, but it is most likely accounted for by visiting friends and relatives (VFR)

Length of stay



- Most of the 12% who were on a day trip were in Leitrim for the Regatta on Sunday, August 3rd

Demographic profile

- 43% of respondents were male and 56% were female
- 74% were over 45

Age	%
<18	1%
18-30	6%
31-45	20%
45-60	35%
61+	39%

Party size

- 80% were with their family or spouse/partner

	All respondents	Overseas only
Spouse/partner	38.3%	41.3%
Family	39.4%	31.5%
Friends	12.4%	18.5%
On my own	9.8%	8.7%

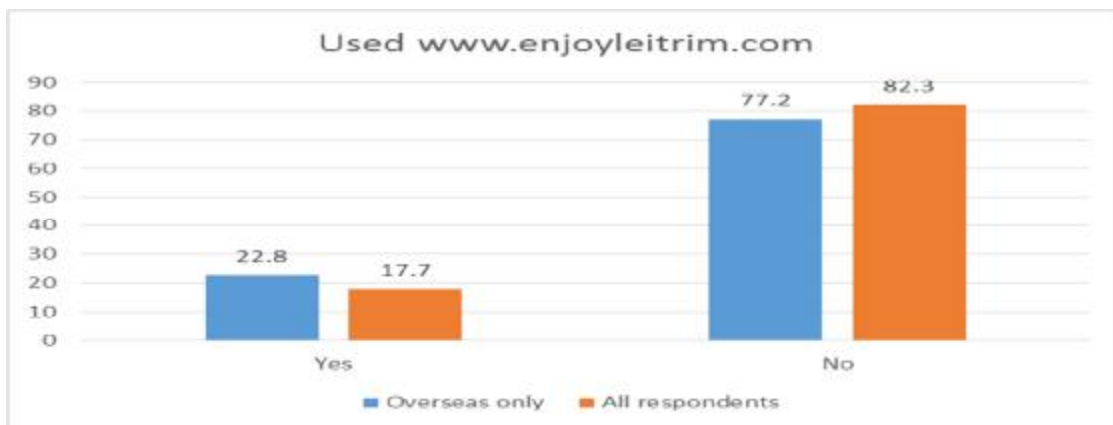
- Among overseas visitors, the mix is different: less people travelling with family and more travelling with spouse/partner or friends

Holiday experience versus pre-trip expectations

	%
Exceed your expectations	43.53
Match your expectations	52.94
Fall below your expectations	3.53

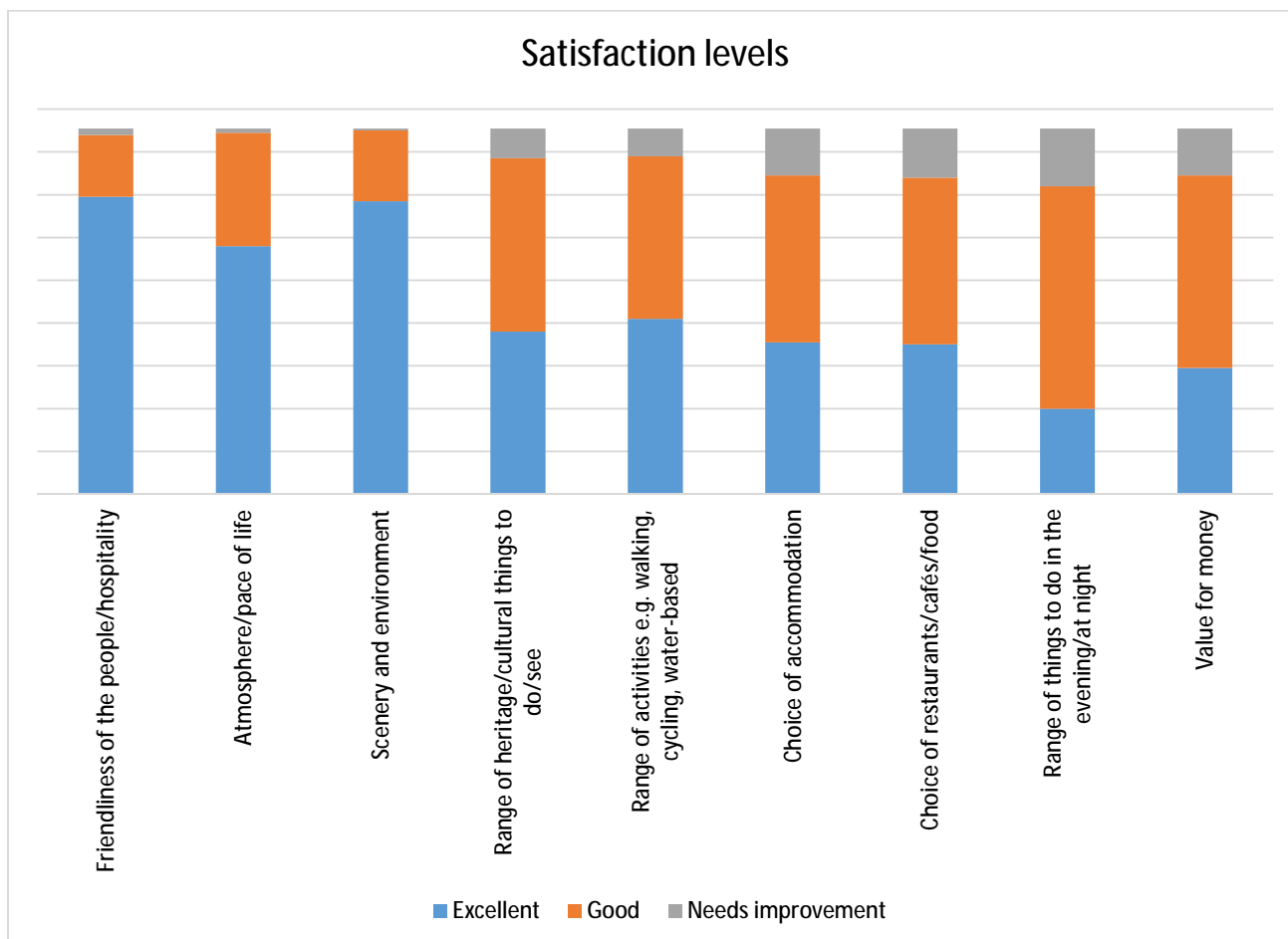
The experience on the ground in Leitrim was very positive; it exceeded pre-trip expectations for 43% of respondents and matched expectations for 53%.

Trip planning



- Low usage of Enjoy Leitrim website – small difference between overseas and total respondents
- Low memory of seeing advertising or articles about Leitrim – no difference between overseas and total respondents. Overall, 26% said they had seen advertising in or articles about Leitrim and 74% had not

Satisfaction levels



- High levels of satisfaction across all categories
- Same pattern between overseas only and all respondents

Trip highlights

"The absolutely beautiful countryside, friendly people, delicious food and seeing where my paternal grandfather was from"

"Sitting on the stone wall near the old abbey in Dromahair on a Sunday morning eating hot scones from the grocer. I could feel my grandda sitting next to me pointing out the sites of his childhood. Also the church ruins in Killanummery on the 131st wedding anniversary of my great grandparents"

"Waterspouts on Lough Allen - great fun. Finding the old remains of the cottage where my dad's relatives came from - was pretty beautiful"

"The whole experience really. The friendliness of the people, the beautiful countryside & the cultural events at the Dock & Corn Mill Theatres. Traditional music night at the Thatched Pub was also fun"

"Being brought fishing by a local we met - was very kind and we had a great time"

"Friendliness of the people, excellent quality of roads, well signposted, easy to get around by car"

"Loved Cavan Burren park. Scenery going to Sligo. Just loved climbing mountains in Glenfarne, quiet walks on boreens away from it all"

"My children's delight at attending lough Allen Adventure centre"

"Views in North Leitrim - Lough Gill - proposed to my girlfriend there"

Missings

Respondents were asked to identify any 'missings'.
Comments centred around these areas:

- Traditional music
- Accommodation
- Need for better promotion
- Signage
- Public transport
- More assistance with tracing ancestors

"Accommodation is very tight and must be booked well in advance"

"Choice of B&Bs offering proper fishing advice"

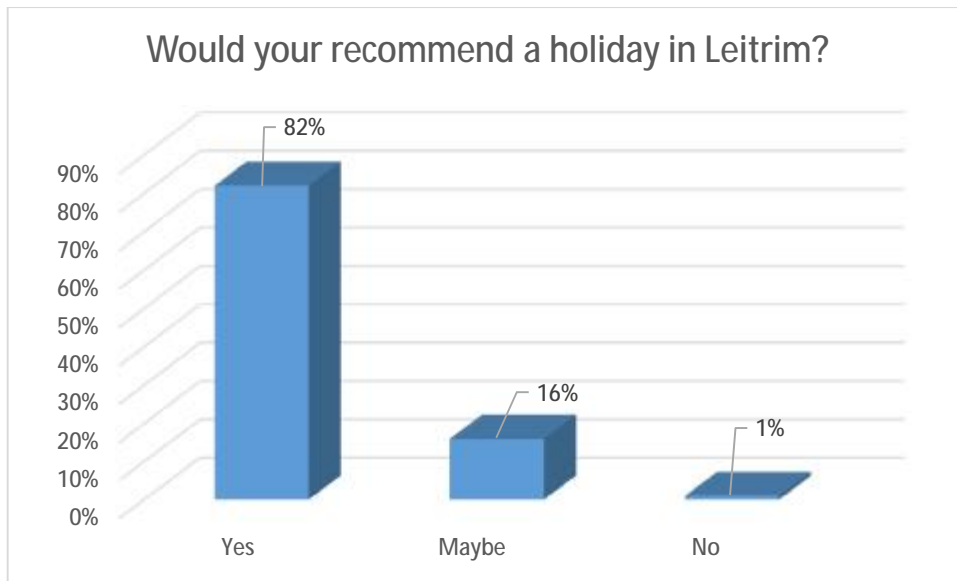
"Improved mooring signage, any pubs we visited weren't overly welcoming seemed tired"

"I think it's lacking in activities to do. Some lovely restaurants e.g. Cottage Jamestown, Oarsman, there could be a better selection. I also think there is a huge lacking in somewhere nice to have a drink in Carrick on Shannon that is not over run by stags/hens"

"More clarity about boat rentals (by the hour or day) on the Shannon"

"Not a lot to entertain the older child 10 plus"

Would people recommend Leitrim?



Leitrim logo

J	K	L
64%	28%	6%

Tagline: *Explore, Experience, Enjoy*

J	K	L
67%	26%	7%

J	K or L
Comments on logo in qualitative research	
<ul style="list-style-type: none"> • Catchy and colourful • Clear, but somewhat unimaginative - more just ordinary lettering than logo • Good colours: Green = natural, purple = historic • I like the colours and I think the 3 word tagline is clever • It is simple I like that it's not loud and in your face, like Leitrim 	<ul style="list-style-type: none"> • A bit bland. Does not stand out. • Adequate • Bit bland & should add picture to the logo • Could have a little more punch • Does not grab your attention • Don't like the heart

Consumer focus groups – qualitative research – participant profile

Galway focus group

	Gender	Age group	Family	Who do they holiday with?
1	Female	25-34	Married, no children	With husband or with groups of friends
2	Female	45-60	Partner, no children	With partner
3	Female	34-45	Married, no children	With husband or with groups of friends
4	Male	25-34	Girlfriend, no children	With girlfriend or groups of male friends
5	Female	45-60	Married, grown up family	With husband and with friends
6	Female	25-34	Single, no children	On her own or with siblings/friends
7	Male	25-34	Married, no children	With wife or with other couples
8	Female	45-60	Single, no children	With friends
9	Male	25-34	Girlfriend, no children	With girlfriend or groups of male friends
10	Female	34-45	Married with young children	With family, sometimes with friends

Dublin focus group

	Gender	Age group	Family	Who do they holiday with?
1	Female	45-60	Married, teenage children	With husband and family
2	Female	45-60	Married, teenage children	With husband for weekends in Ireland, otherwise abroad with family
3	Male	25-34	Girlfriend, no children	With girlfriend or groups of male friends
4	Male	25-34	Girlfriend, no children	With girlfriend or groups of male friends
5	Female	35-45	Single, no children	With groups of friends or with siblings
6	Female	35-45	Single, no children	With groups of friends or with siblings
7	Female	34-45	Married, young children	With husband and children
8	Female	34-45	Single, no children	With friends
9	Female	25-34	Single, no children	With friends and siblings
10	Female	45-60	Married with teenage daughter	With husband and daughter, also with friends
11	Female	45-60	Married with children	With husband and children, sometimes with friends