



Comhairle Chontae na Gaillimhe
Galway County Council



COUNTY GALWAY TOURISM STRATEGY

23-31





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Message from the Cathaoirleach



As Cathaoirleach of Galway County Council, I welcome this first Tourism Strategy for the County and the opportunities that it represents.

County Galway has a special place in the hearts and minds of many. Its natural environment, traditional and contemporary culture, people and creativity continue to attract visitors while ensuring it remains a place that residents are proud to call home. It is our collective responsibility to ensure it remains that way and continues to be an attractive place to visit and to live in.

There is an adage that tourism is everyone's business, and the cross-sectoral and inter-agency collaboration that is at the core of this new Strategy confirms that this is the case. I would like to thank all those who gave of their time, experience and energy in the development of this Strategy, including public bodies, private enterprises, communities and individuals - all of whom recognise the far-reaching benefits of tourism.

This partnership approach provides a solid and positive basis for the further development of tourism across our unique County, and I have no doubt that this Strategy will serve all partners well in the coming eight years.

Liam Carroll

Cathaoirleach
Galway County Council

Chief Executive's Introduction

As the most visited destination outside of Dublin, Galway benefits considerably from tourism – with 984,000 domestic trips and 1.7 million overseas visitors contributing €754 million in tourism expenditure.

The adoption of this Strategy means that, for the first time, there is a collaborative framework in place for the development of tourism over the coming eight years across the County. This framework will support the delivery of the vision that has been articulated as a guiding statement of intent, namely that:

County Galway is Ireland's leading cultural and natural heritage tourism destination - a vibrant and integrated destination that respects its unique culture and environment, proudly sharing it with visitors in engaging ways. It celebrates diversity, protects its heritage and is led by sustainable principles.

The Strategic Framework that provides the structure for the delivery of the Strategy is built around four strategic areas, each with key actions and recommendations. It is also supported by the identification of six Development Zones that ensure more targeted interventions where they are required to address more local challenges and opportunities.

As well as social, cultural and environmental benefits, the sustainable growth of tourism will deliver significant economic benefits for the County. This tourism strategy represents an opportunity to support existing and create new employment. The strategy will establish sustainability as a foundation for the future, and will extend the benefits of tourism to less-visited areas.

As has been said, the delivery of a tourism strategy requires a collaborative approach, and this Strategy embraces partnership and collaboration. I very much look forward to working with our key partners in ensuring that tourism in County Galway continues to deliver for visitors, communities, and businesses.

Liam Conneally

Chief Executive
Galway County Council



Director of Services Introduction

The County Galway Tourism Strategy is an important milestone for the Council. It provides a roadmap that will unlock the social, cultural and economic potential of tourism across the entire county, doing this in a sustainable manner. By enhancing our thriving tourism industry and leveraging the successes of key destinations, the strategy will build on the collaborative approach that has been taken in the county over many years and it will build on the regional strategies for the Wild Atlantic Way and Ireland's Hidden Heartlands. It seeks to stimulate tourism development throughout Galway, enhancing it in areas that already strong and nurturing it in areas that are less mature from a tourism perspective with a commitment to delivering economic, social, cultural, and environmental benefits to diverse locations and communities.

Through sustained collaboration with the community, industry stakeholders, and strategic partners, our objective is to establish a vibrant and resilient tourism destination, emphasising sustainability, economic growth, and regional diversity. The launch of this strategy provides a structured framework and strategic approach to guide future tourism support and investments for the next eight years.

Alan Farrell

Director of Services
Galway County Council





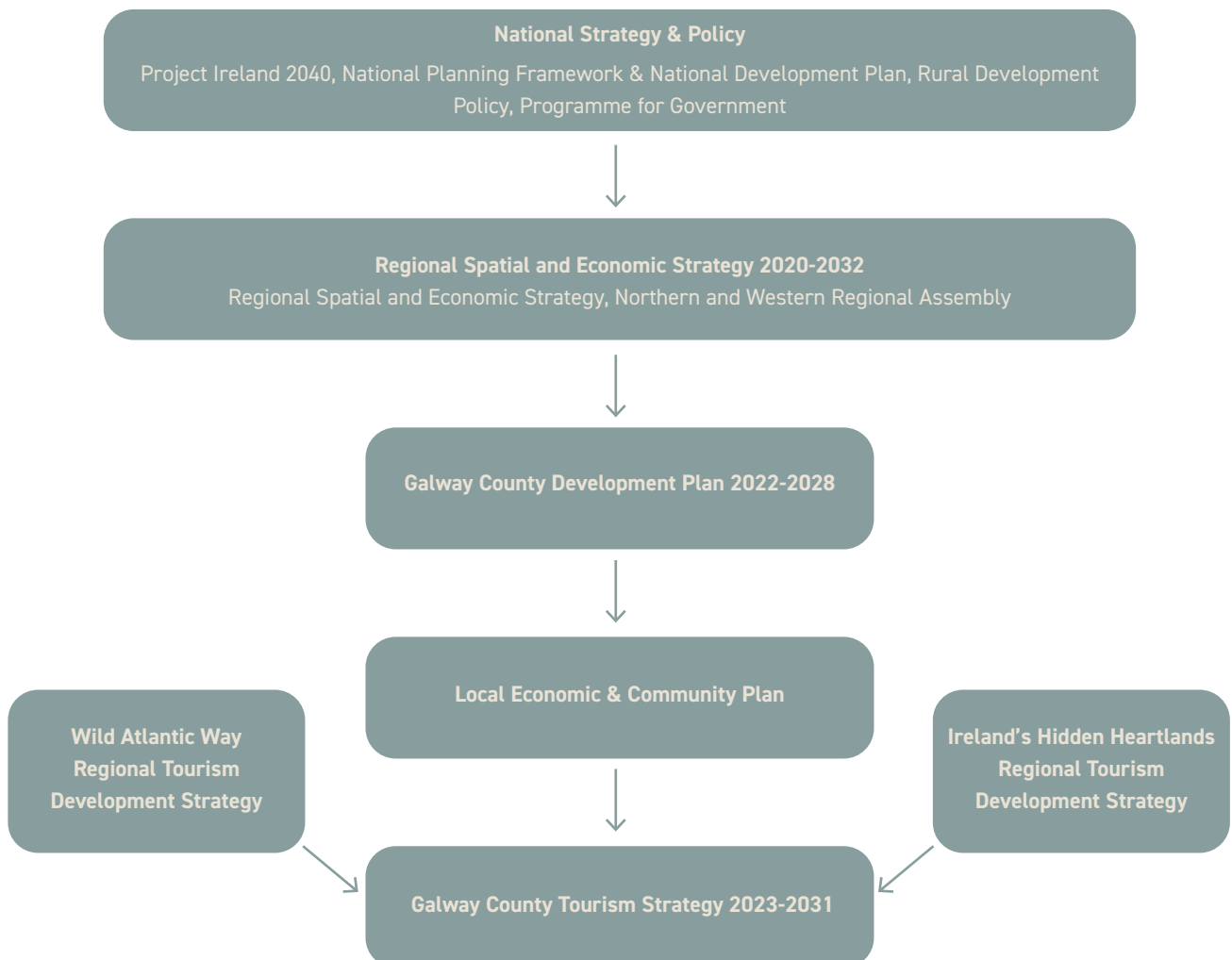
Executive Summary

County Galway is known for its wealth of natural and built heritage assets offering rich and diverse experiences across the county. The purpose of this Tourism Strategy is to provide a focused approach to tourism development and promotion in order to increase the contribution of tourism to the County's economy while protecting and enhancing sustainability and the quality of life in County Galway.

The County Galway Tourism Strategy 2023-2031 sits within a wider strategic context that provides a rationale and direction for the development of tourism in the County. These are summarised below.

Against this backdrop, tourism needs to be considered as a contributor to national development objectives, and the strategic direction identified for County Galway tourism in this Tourism Strategy aligns with those objectives. However, there is also a need to maintain focus on providing an excellent experience for visitors and the Tourism Strategy is likewise informed by their behaviours, needs and preferences.

Galway is a well-established tourism destination for both domestic and international visitors, with 984,000 domestic trips and 1,694,000 overseas visitors to the County making





a combined contribution of €754 million. This Strategy recognises a number of main segments that offer the greatest potential for tourism in County Galway, as well as a number of valuable smaller segments - as shown below.

TARGET SEGMENTS

Primary Target Markets/Segments
Independent Touring Visitors
Outdoor Actives (casual participants)
Domestic Families
Domestic Adult Urban Weekend Breaks

Niche Target Markets/Segments
Outdoor Actives (dedicated participants)
General Coach Tours
Special Interest Group Tours
Daytrippers
Visitors with disabilities / limited mobility
Incentive, Events and Cruise

Not all areas of the County are equally well-known. Core infrastructure - such as accommodation and attractions - is clustered in particular areas, naturally following the patterns of highest visitor demand. One of the challenges of this Strategy, therefore, is to seek to manage well-developed tourism areas within the County with the further growth of less-established areas.

The Vision articulated in this Strategy for tourism in County Galway plays to its strengths as a county that offers richly layered natural and built heritage experiences steeped in generations of tradition, alive with vibrant contemporary culture. It also reflects the challenges we intend to surmount over the duration of the Strategy, including the elevation of areas where tourism is underdeveloped, and the opportunity presented by a unified County and City tourism destination brand.

The Vision Statement is articulated as follows.

“County Galway is Ireland’s leading cultural and natural heritage tourism destination - a vibrant and integrated destination that respects its unique culture and environment, proudly sharing it with visitors in engaging ways.

It celebrates diversity, protects its heritage and is led by sustainable principles.”





STRATEGIC FOCUS 1
Destination
Management

STRATEGIC FOCUS 2
Experience
Development

STRATEGIC FOCUS 3
Capacity and Skills
Development

STRATEGIC FOCUS 4
Marketing and
Communications

The Strategic Framework provides the structure that will enable County Galway to achieve its Vision and provides coherence for activity and investment over the eight year duration of the Strategy. Four areas for strategic focus are identified in the Framework.

The priority for Galway County Council Tourism will remain the ongoing delivery of existing and new collaborative projects that offer major opportunities for tourism growth across the County, and a number of principles will help guide activities and interventions, ensuring future growth is sustainable. These principles are:

1. Continuing to prioritise delivery of major collaborative opportunities with strategic partners, including existing and future Visitor/Destination Experience Development Plans, Tourism Masterplans, and the Greenways.
2. Supporting the extension of tourist's length of stay and expenditure, and encouraging exploration of less visited areas.
3. Prioritising the goal of fully sustainable tourism and aligning with national and local Climate Action Plans.
4. Supporting Gaeltacht culture, language and communities.
5. Prioritising the harnessing of existing natural and built assets, outdoor tourism and ongoing investments, especially in blue and green infrastructure.
6. Establishing tourism as a core economic activity across the County and promoting the growth of tourism - including in less visited areas - through the development of existing and new tourism experiences and destinations.
7. Developing a zone approach that will enable the targeting of relevant interventions at a more local level.
8. Introducing and supporting innovation.
9. Enhancing industry, community and stakeholder collaboration.
10. Improving universal access in tourism experiences.

While the priority will remain the delivery of major collaborative projects, there are also more area-specific opportunities and challenges that would benefit from an approach that addresses these directly. For this reason, six development zones have also been identified - based on maturity, sustainability, assets, industry and community capacity. The Zones provide a structure for integrated and focused interventions that match their current needs and future tourism potential. They are not marketing destinations.





Creating a fertile environment for growth goes far beyond the tourism sector. The successful implementation of this Tourism Strategy will depend on the organisational framework for delivery, effective partnerships among the principal interests, and the resources made available. Stakeholder interdependency is an important part of delivering a Tourism Strategy at the destination level and while there are actions that can be undertaken by the local authority, many actions can only be undertaken by other stakeholders, as well as the business and community sectors. Galway County Council cannot, in isolation, deliver a successful Tourism Strategy but it can play an essential role in initiating, coordinating and linking the various interests and stakeholders. With partnership and collaboration around an agreed set of actions and goals, as laid out in the Action Plan, preferential conditions are created to support sustainable growth.





CONTEXT

Introduction

Galway County Council is the Local Authority for the County of Galway, excluding the City area. Galway County Council is comprised of 39 Elected Members from 5 Municipal Districts who approved a new Galway County Development Plan in May 2022.

Galway County Council has two key responsibilities – to provide good quality accessible services in an efficient and effective manner, and to exercise its civic leadership role to promote the economic, social and cultural development of the County in a balanced and sustainable manner.

In its Corporate Plan 2020-2024, Galway County Council published a specific action to develop and implement a Tourism Strategy which could facilitate the continued expansion of the tourism sector. This action is in support of its overarching strategies, including maximising the continued and sustainable economic and enterprise development of the County.

1.1 Background and Project Brief

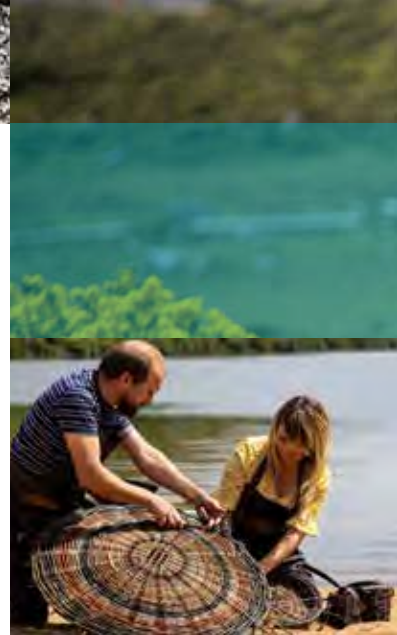
Originating from within the Economic, Community and Rural Development Directorate, the County Tourism Department is a core function and a priority for Galway County Council, with tourism being recognised as a key driver of economic, social and cultural regeneration. In 2021, Galway County Council tendered for a *Tourism Strategy for County Galway, 2023-2031*, the overarching objective of which is to develop: “an integrated and sustainable County Tourism Strategy to

guide the future development, integration and growth of the tourism sector across County Galway, encompassing all areas of the County outside of the municipal limits of Galway City”

The Strategy addresses tourism development, marketing and actions within which environmental assessment and sustainability are embedded.

The scope of work included addressing tourism sustainability; economic and community development; product development; branding and marketing objectives; environmental assessments relevant to a statutory document; and a road map for tourism development up to 2031.

CHL Consulting and Minogue & Associates were appointed to work with Galway County Council throughout 2022 to develop the *County Galway Tourism Strategy 2023-2031*, the details of which are presented here. The Strategy comprises this Main Report which presents the Policy Context, Market, Gap and SCOT (Strengths, Challenges, Opportunities and Threats) Analyses in Section 1 before moving to the Strategic Framework and Implementation in Section 2. It is accompanied by separate Strategic Environmental Assessment and Appropriate Assessment Screening Reports.





1.2 Approach and Methodology

The project approach taken was structured over four phases.

Phase One included desk research, policy and strategy reviews, public survey with 199 responses, individual and group consultations, data collection and analysis, site assessments and mystery shopping, industry ideation workshops, stakeholder workshops, environmental screening and statutory engagement. Phase One is illustrated in Figure 1.

Phase Two included the development of a vision and strategic framework for the Tourism Strategy, establishing key actions, initial Strategic Environmental Assessment and Appropriate Assessment screening, and development of a marketing and implementation roadmap.

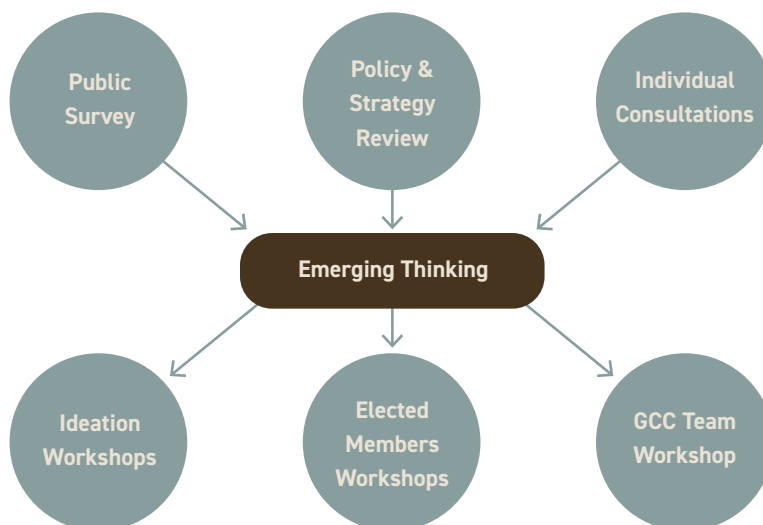
Phase Three included working on the final strategy documents, putting them forward for statutory Strategic Environmental Assessment and Appropriate Assessment screening and making these documents available for public

consultation. The results of the SEA/AA screening are available as separate reports.

Phase Four included the presentation of the draft Tourism Strategy to Council for discussion and, following integration of feedback, for adoption. The Economic Development and Enterprise Strategic Policy Committee¹ has been involved in shaping the project from the outset, supporting policy formation at each phase of strategy development, and endorsing the final County Galway Tourism Strategy 2023-2031 before its adoption by Galway County Council.

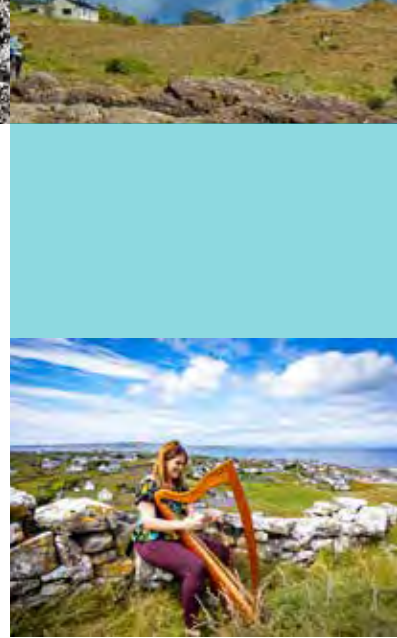
Due to the extensive nature of the work programme, large amounts of existing plans and strategies and new information were gathered. Key points which lead the direction of the Strategy are contained in this document and presented in the sections that follow.

FIG. 1: SUMMARY OF PHASE ONE METHODOLOGY



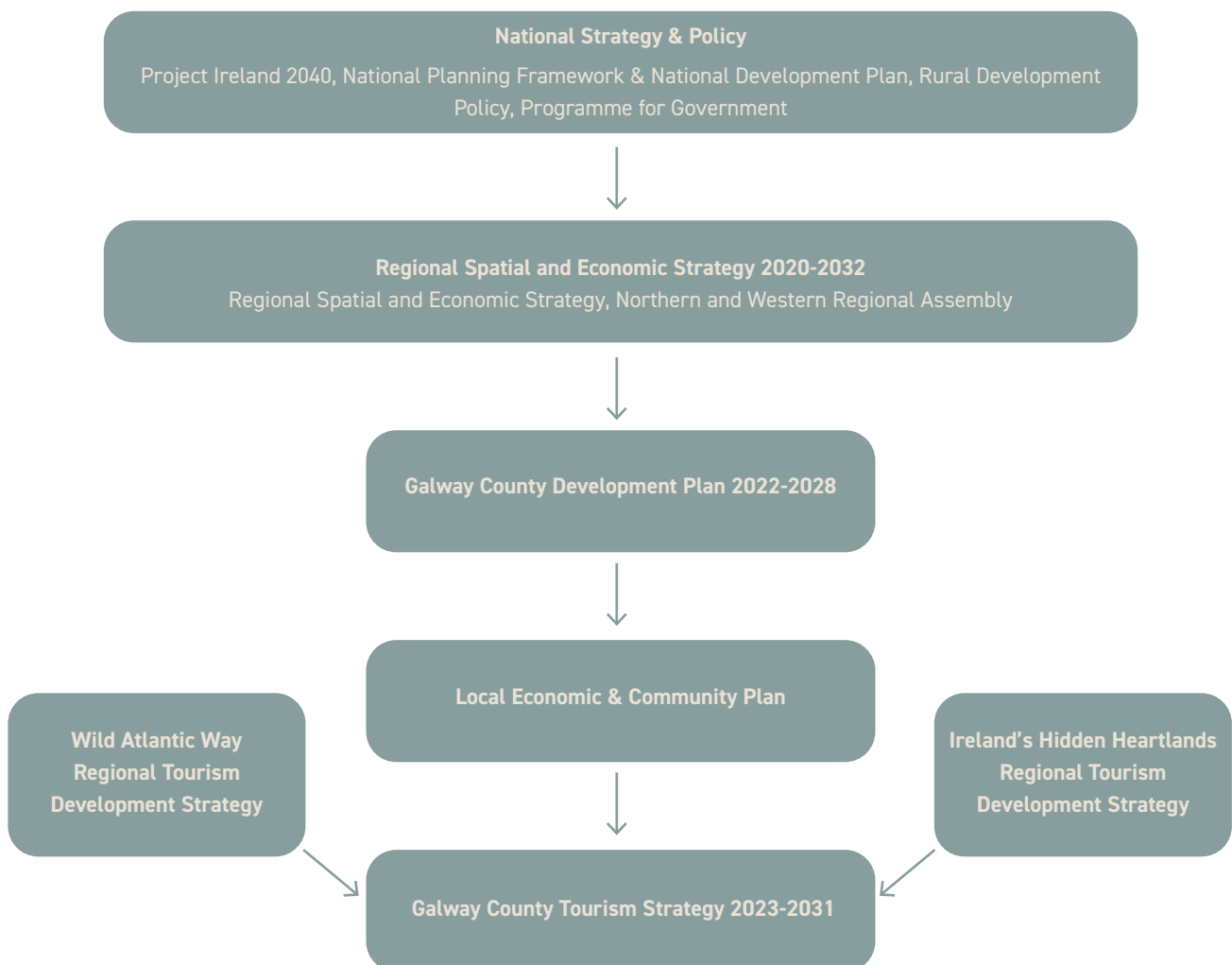
¹ Strategic Policy Committees (SPC) provide a policy centred forum which can harness the experience of relevant external bodies and groups. They also enhance the role of the elected Councillors by providing a platform for input to the policy formation process at an early stage, for effective monitoring of existing policies and policy review. It is the task of the SPC to advise and assist the council in the development of policy, while the final policy decision will rest, ultimately, with the full Council.

2 Policy and Strategic Context



The *County Galway Tourism Strategy 2023-2031* sits within a wider strategic context that provides a rationale and direction for the development of tourism in the County - see Figure 2.

FIG. 2: HIERARCHY OF STRATEGIC CONTEXT FOR TOURISM STRATEGY



At a national level, *Project Ireland 2040*, the *National Planning Framework* and the *National Development Plan* work together to establish a coordinated planning approach for the country, with the Northern and Western Regional Assembly providing a more regionalised strategy. In this national and regional context, the *Galway County Development Plan* sets the blueprint for the sustainable development of the County and from it emerge a number of other plans that inform the Tourism Strategy, including the *Local Economic & Community Plan*, the *Heritage & Biodiversity Plan*, the *Arts Plan* and the *Culture and Creativity Strategy*.

There are also additional strategies that provide a wider tourism context - the *Wild Atlantic Way Regional Tourism Development Strategy 2023-2027 (draft)*; *Ireland's Hidden Heartlands Regional Tourism Development Strategy 2023-2027 (draft)*; the *Lough Derg Visitor Experience Development Plan 2020-2024*; the *Connemara Coast and Aran Islands Visitor Experience Development Plan 2020-2024*; the *Burren and the Cliffs of Moher Visitor Experience Development Plan*; the *Tourism Masterplan for the Shannon 2020-2030*; and *Beara Breifne Way Tourism Masterplan*.

Against this backdrop, tourism needs to be considered as a contributor to national development objectives, and the strategic direction identified for County Galway tourism in this Tourism Strategy aligns with those objectives. However, there is also a need to maintain focus on providing an excellent experience for visitors and the Tourism Strategy is likewise informed by their behaviours, needs and preferences (Sections 3 and 4).

In excess of thirty documents, plans and strategies were reviewed as part of the process. Table 1 identifies the main strategies and policies that provide the strategic context for the development of the Tourism Strategy. Many more national guidelines, town and village plans, strategy updates, action plans and individual submissions have also informed the development of the Strategy.

TABLE 1: KEY STRATEGIC DOCUMENTS

Document
Project Ireland 2040: the National Planning Framework
Project Ireland 2040: the National Development Plan 2021-2030
Regional Spatial and Economic Strategy 2020-2032, Northern and Western Regional Assembly
Our Rural Future: Rural Development Policy 2021-2025
Creative Ireland Programme 2017-2022
Programme for Government – Our Shared Future
Climate Action Plan 2021
Food Vision 2030
Galway County Development Plan 2022-2028
Galway County Local Economic and Community Plan 2016-2022
Plean Straitéiseach Údarás na Gaeltachta 2021-2025
Ireland's Hidden Heartlands Tourism Development Strategy 2023-2027
Wild Atlantic Way Tourism Development Strategy 2023-2027

Given the integrated nature of policy around planning and development in Ireland, it is not surprising to see the same themes arise time and again. The most important of these in terms of developing a new Tourism Strategy for County Galway are summarised here.

Key Themes Arising from Policy Review

- Support for the sustainability of rural economies and communities.
- A focus on sustainability in all its forms, including environmental, social and economic.
- The need for greater integration and connectivity, physical and digital.
- Support for Gaeltacht language and culture.
- Support for enhanced digital infrastructure and competency across all areas and sectors.
- Community engagement as a core part of all development.
- Support for inter-agency/stakeholder/jurisdiction collaboration.
- An emphasis on 'opening up the outdoors'.
- An emphasis on green and blue infrastructure and associated amenities and experiences.
- Enhanced recognition of the value of culture and the arts.
- An ongoing focus on employment, enterprise, skills and innovation

B

Market Analysis



The market environment in which County Galway operates as a tourism destination is critically important in terms of opportunities and challenges. The following are key points arising from the market analysis, including demand and supply side assessments, as well as feedback from industry, stakeholders and community. It also includes the establishment of economic baseline indicators for the County.

3.1 Key Points from Demand-Side Assessment

3.1.1 Consumer Trends

The tourism landscape has changed significantly in the last two years as a result of the Covid19 pandemic and restrictions associated with it. Certain trends that were evident before the outbreak continue to be relevant to Ireland, and to Galway, as a tourism destination, including:

- exponential use of digital for trip inspiration, planning and booking,
- and an emphasis on having 'experiences' rather than buying tourism 'products'.

However, a number of new trends have emerged, in Ireland and internationally, that are particularly relevant. These include:

- increasing use of the outdoors for leisure and recreation, with greater use of trails and water;
- increase in availability of, and creativity towards, outdoor dining;
- growth in 'Edventures';² holidays that combine education with a holiday for younger members of the family while adults combine family time with remote working;
- emergence of digital nomads who relocate for longer periods away from home due to more flexible working conditions and the improved remote working infrastructure that is now available;
- increased focus on green travel options, especially with the current energy crisis and increasing use of electric vehicles.

Given investment by Galway County Council in recent years in infrastructure for outdoor recreation, outdoor dining and remote working, and the focus on providing E-charging facilities, the trends above provide a good basis for further tourism growth, and particularly for areas that have not been traditionally tourism destinations.

However, there are also some emerging constraints that will need to be monitored for long-term consequences. These include the energy crisis and its impact on disposable income as well as on the cost of travel. The conflict in Ukraine and the ongoing uncertainties with regard to Brexit may also affect international travel.





3.1.2 Tourism in Galway

Tourism is a valuable economic contributor for County Galway with:

- > 1.7 million overseas tourists³ spending €532m⁴
- > 984,000 domestic trips with spend of €222m⁵

This makes it the most popular destinations in Ireland for tourists outside of Dublin. However, these estimates include the city - a major tourism destination - and official statistics do not provide any further breakdown between City and County.

In addition, visitor flows favour specific areas - as illustrated by the Fáilte Ireland map of tourism 'hot spots', with Galway City and the area immediately around it being a significant destination. Clifden is also obvious as a destination in its own right. But it is evident from this illustration, and the supporting data presented elsewhere in this Strategy, that there are large areas within the County that are not on the tourism radar, especially the eastern half of the County.

3.1.3 Tourism in Neighbouring Counties

As a source of additional visitors, it can be an advantage to be close to popular areas - especially those that are linked to Galway through collaborative projects such as Visitor Experience Development Plans (e.g. Lough Derg, the Burren), Greenways, Blueways, other trails, and co-operative branding. However, it can also be a challenge in terms of competition. County Galway neighbours six other local authority areas: Clare, Tipperary, Offaly, Roscommon, Mayo and Galway City. Some of these are significant tourism destinations in their own right (see Table 2), which is both an advantage and a disadvantage to areas of the County that border them.



3 NB A 'tourist' is an overseas visitor who spends at least one night (and less than a year) in the country. The term 'visitors' covers all, including domestic and daytrippers.

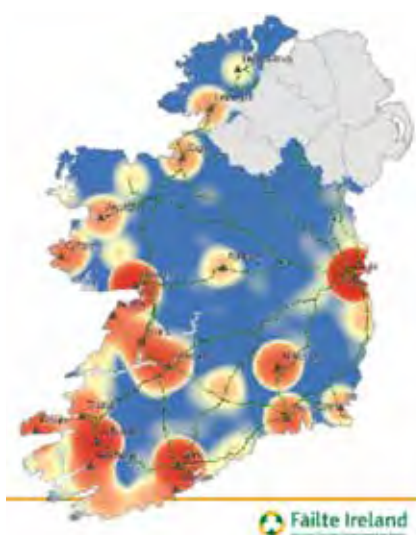
4 2019, Fáilte Ireland

5 2022, Domestic Trips and Revenue by County, Fáilte Ireland

TABLE 2: VISITOR NUMBERS IN A SELECTION OF NEIGHBOURING COUNTIES⁶

County	Visitor Numbers
Galway (City & County)	2.7m
Clare	1.3m
Tipperary	797,000
Mayo	1.0m

HEATSPOT MAP OF TOURISM OVERNIGHTS



3.1.4 Key Visitor Characteristics

The majority of tourists⁷ to Galway are on holiday - which means they can be promoted to, will be seeking tourism accommodation and are available to participate in leisure/recreational activities. But there is also a strong VFR (visiting friends and relatives) segment, which has implications for revenue generation opportunities as well as for communications/marketing activities. The VFR segment is particularly strong in the east of the County (39% of overseas visitors to the Ireland’s Hidden Heartlands region are VFR).

Average length of stay can be quite short and differs depending on the part of the County - ranging from an average of just over 2 nights for domestic tourists within the Ireland’s Hidden Heartlands to overseas visitors spending a week along the Wild Atlantic Way.

The tourism market is also highly seasonal across the County, west and east, although it has been gradually extending. Approximately 36% of overseas holidaymakers visit the West in July and August, although there is a strong shoulder season (May/June/September). The January to April period accounts for less than 10%. Activity visitors (e.g. walkers, cyclists, anglers) can be a valuable source of spring and autumn business, as can those participating in events, education and business.

3.1.5 Segmentation Analysis

In terms of overseas tourism to Ireland, the tourism agencies have identified four main market areas as offering the best opportunity for Irish tourism: Britain, Germany, France and the USA.

- **British** visitors may feel as if they know what Ireland has to offer, due to proximity, and therefore their behaviour is similar to that of the domestic market.
- **Germans** are motivated by opportunities to get active in the outdoors and the dramatic coastal scenery is a unique selling point for this market; they are also interested in authentic local culture.
- **French** enjoy getting off the beaten track and exploring unspoilt landscapes, are attracted to authentic local experiences and particularly interested in water-based experiences.
- **US** visitors longer staying and higher spending, with some being connected through the Irish diaspora. They are drawn to iconic attractions.

The current VEDPs⁸ within the County focus, for the most part, on the overseas markets. However, the domestic market is a very valuable one for County Galway and has been increasingly so in the last two years as a result of the restriction on international travel. A new approach to market segmentation has been adopted by Fáilte Ireland, based on the travel motivations of visitors. These can be summarised briefly as follows.

⁶ Source: 2022 Domestic Trips and Revenue by County & 2019 Approved County Data, Fáilte Ireland

⁷ Sources: CSO, Fáilte Ireland

⁸ The Connemara and Aran Islands Visitor Experience Development Plan, the Lough Derg Visitor Experience Development Plan 2020-2024, and The Burren and the Cliffs of Moher Visitor Experience Plan

- **Social Energy:** to enjoy the atmosphere, vibrancy and energy of a place.
- **Adventure:** to push myself and do things out of my comfort zone, mainly in the outdoors.
- **Exploration:** to explore the new and unfamiliar in an area, including culture.
- **Time Out:** to escape my everyday life and de-stress.
- **Reconnection:** to relax and do very little, mainly with person or friends close to me.
- **Bonding:** to nurture the relationships with my family and those closest to me.
- **Celebration:** to celebrate a special occasion.

For tourism to areas of County Galway within Ireland's Hidden Heartlands, *bonding*, *social energy* and *adventure* are the primary motivators. For tourism in the Wild Atlantic Way, in addition to *bonding* and *social energy*, *reconnection* and *exploration* are also important.

Based on the above and on the available product and natural assets of the County, a number of market segments have been identified for County Galway, including niche segments that provide valuable, if smaller business to specific areas and at particular times of the year. These are listed in Table 3 and assessed further in the Gap Analysis in Section 4.

TABLE 3: TARGET SEGMENTS

Primary Target Markets/Segments
Independent Touring Visitors
Outdoor Actives (casual participants)
Domestic Families
Domestic Adult Urban Weekend Breaks
Niche Target Markets/Segments
Outdoor Actives (dedicated participants)
General Coach Tours
Special Interest Group Tours
Daytrippers
Visitors with disabilities / limited mobility
Incentive, Events and Cruise





3.2 Key Points from Supply-Side Assessment

3.2.1 Access

With the improvements in the national road network over recent decades, Galway is now readily accessible via the M6 for both Irish residents living in the Greater Dublin Area and for visitors arriving by air and sea into the capital. It is also easily accessed via the M17 and M18 by visitors arriving into Ireland West and Shannon Airports.

The importance of these three international airports varies depending on which area of Galway is under consideration - as Table 4 demonstrates. Shannon Airport is particularly important for south-west and south-east Galway, with Gort only half an hour drive away, Oranmore fifteen minutes beyond that and Portumna an hour and a quarter. From Ireland West Airport at Knock, visitors can drive to Oranmore in approximately one hour, Ballinasloe in an hour and ten minutes, and Clifden in two hours. Although more important in terms of access into the country as a whole, distances from Dublin Airport are much further, with the distance from Dublin to Ballinasloe being the same as that from Ballinasloe to Clifden.

These points indicate that ensuring sufficient air capacity from a variety of source markets to both Shannon Airport and Ireland West Airport is of strategic importance to tourism in County Galway.

To date, while there are relatively good connections to Shannon from the UK and USA, there is an opportunity to increase connections with Europe that would appeal to Europeans in addition to serving Irish residents. There are reasonable connections to Ireland West from the UK but again there is an opportunity to increase European connections.⁹

TABLE 4: DISTANCES FROM MAIN AIRPORTS TO A SELECTION OF TOWNS IN COUNTY GALWAY

Destination	From Ireland West Airport, Knock	From Shannon Airport	From Dublin Airport
Ballinasloe	125km - 1.24hr	116km - 1.09hr	164km - 1.55hr
Portumna	125km - 1.36hr	98km - 1.12hr	180kms - 2.18hr
Gort	111km - 1.14hr	49km - 30min	232kms - 2.30hr
Oranmore	94km - 1.05hr	73km - 46min	209km - 2.21hr
Uachtar Árd	108km - 1.47hr	118km - 1.39hr	242km - 3.15hr
Clifden	126km - 2.01hr	168km - 2.21hr	293km - 3.57hr

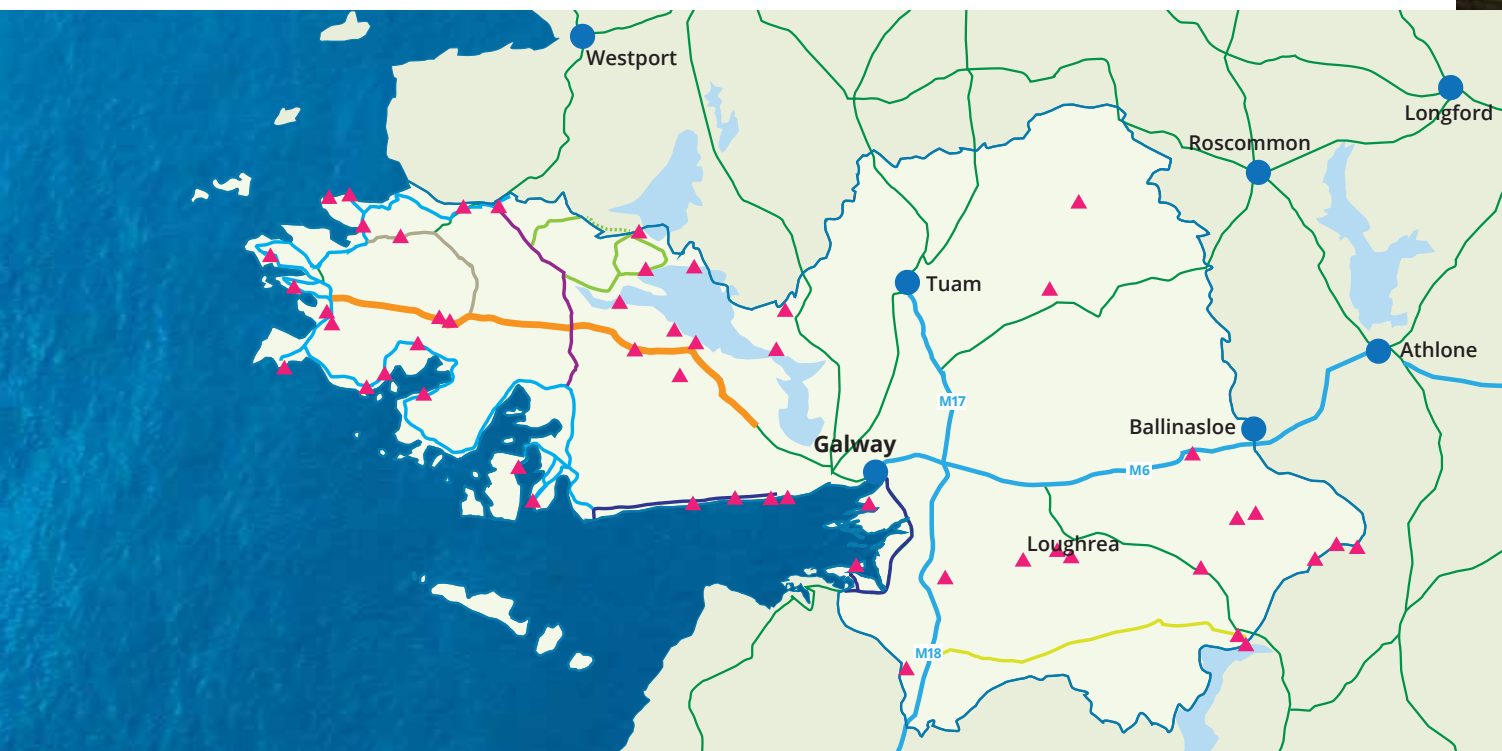
More locally, the Wild Atlantic Way touring route has enhanced awareness of the coastal roads through the County, encouraging use of the N67 from Kinvara to Galway City, from where touring visitors make a choice whether to use the N59 through the centre of Conamara to Clifden and the coastal area around it, or to use the R336 coast road.

⁹ Source: Fáilte Ireland



Most distances between towns in the County are comfortable driving distances for visitors, regardless of whether they are on motorway or national roads or not, as many are on a touring holiday and driving through scenic landscape and between key attractions is an important part of the holiday experience. However, there are areas within the County that require additional drive time and visitors will need to feel sufficiently motivated to go out of their way to visit them if they are not already staying in the area. For example, it is possible to drive between Galway City and Clifden taking a very scenic route along the coast through An Spidéal, Carna, Roundstone and Ballyconneely, taking in the area around Ceantar na nOileán, but this takes almost three hours - a full day of exploring, if you include stop off time - and as many overseas visitors in particular are short on time, they are more likely to want to spend that time visiting places they have heard of such as Clifden itself, Kylemore and the National Park. In terms of public transport, there are Expressway bus connections between Galway City and Shannon and Ireland West Airports. There are rail services through the east and south west of the County including: Ballinasloe, Woodlawn, Attymon, Athenry, Oranmore, Craughwell, Ardrahan and Gort. Bus Éireann provides services connecting Galway City to other towns in the County and Local Link Galway¹⁰ provides bus connections between Portumna and Ballinasloe, Ballinasloe and Loughrea, and Gort and Loughrea. There is a bus service along the south Conamara coast, but services to smaller towns and villages are very limited.¹¹

FIG. 4: COUNTY TRANSPORT AND STUDY STRATEGY SUMMARY MAP¹²



- ▲ Scenic Views
- Galway Bay Scenic Route
- Galway Clifden Scenic Route
- Lough Corrib Scenic Route
- Lough Corrib Scenic Route - County Mayo
- Maritime Scenic Route
- Maum Valley Scenic Route
- Recess Letterfrack Scenic Route
- Slieve Aughty Scenic Route
- County Boundary

¹⁰ <https://www.locallinkgalway.ie/services>

¹¹ A detailed analysis is contained in the County Development Plan, Appendix 3: County Transport and Planning Study

¹² Galway County Development Plan, Appendix 3



3.2.2 Accommodation Capacity

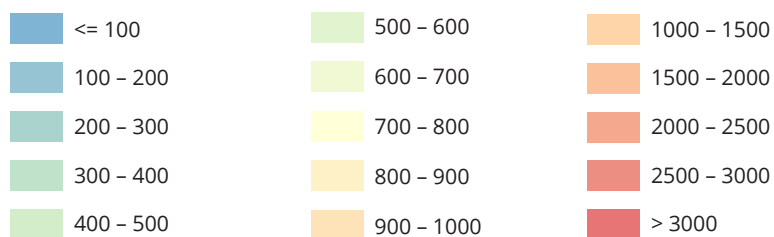
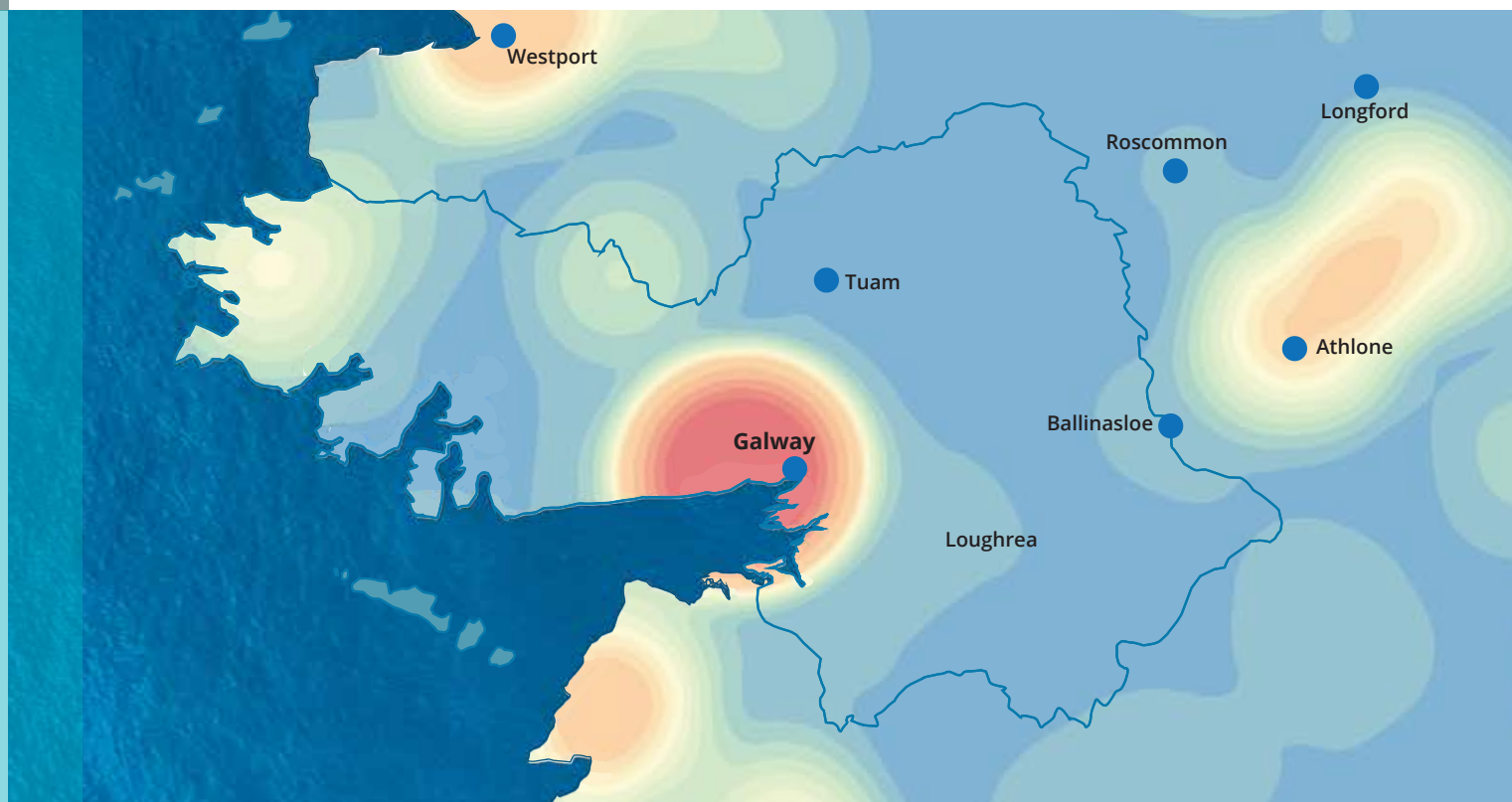
Galway is well-served in terms of tourist accommodation, with over 17,000 nightly bed spaces between City and County, which provides maximum annual capacity of over 6 million beds overall. Over half of this capacity is in County Galway, which has a nightly capacity of 9,000 bed spaces (including Airbnb) providing a maximum capacity of 3.3 million beds¹³ - see Table 5.

There is a good variety of accommodation types as well, catering to a range of budgets and visitor segments, although there are a number of noticeable gaps, including a gap in caravan and camping accommodation, and a gap in provision of RV stops.

However, more importantly in terms of the distribution of tourism across the County is the fact that accommodation is clustered along the western coast and close to Galway City, as illustrated by Fig. 5. There is little accommodation capacity in the north east of the County, with recent estimates suggesting only 7% of total bed capacity of Galway City and County being located within Ireland's Hidden Heartlands Region.¹⁴

Galway County Council has provided a serviced recreational vehicle rest area in Castle Harbour, Portumna, which remains busy throughout the season.

FIG. 5: ACCOMMODATION DISTRIBUTION¹⁵



¹³ Maximum annual capacity is based on each bed being available 365 nights a year, which is rarely the case. It is a useful illustration of whether the bed capacity is adequate to meet current and likely future demand.

¹⁴ 2019, 'Accommodation Investment Toolkit', Fáilte Ireland.

¹⁵ Source: Fáilte Ireland

TABLE 5: MAXIMUM NIGHTLY ACCOMMODATION CAPACITY¹⁶

Type	No. of Properties	No. of Rooms	Bed Spaces
Hotel	51	1,861	4,757
5-star	2	158	
4-star	18	932	
3-star	19	586	
2-star	7	123	
Approved	5	62	
Guesthouse	10	107	271
B&B	73	316	777
Hostel	7	163	326
Caravan & Camping	3	130	538
Self Catering	36	36	194
Welcome Standard	112	484	1,525
Total	292	3,097	8,388
Airbnb capacity*	166	400	804

* excl. those listed elsewhere & shared rooms

3.2.3 Attractions, Heritage and Culture

Galway is rich in heritage and culture, from the traditional culture of the Gaeltacht - with its music, dance, storytelling and Gaeilge - and the natural heritage of mountains, bogs and water, through to contemporary art and culture, and the maritime and boating heritage of the coastal areas. It carries evidence of thousands of years of history in its landscape and structures, is home to vibrant towns and villages, and continues to welcome new cultural communities that now make County Galway their home.

In many parts of the County, there are dynamic heritage-focused groups who have been actively working with the County Heritage Officer and through the County Heritage Plan on a variety of projects¹⁷ including sound maps and digitisation. These groups and projects represent a valuable asset that can reach new audiences by integration into a cohesive strategic framework for tourism. There is also a particular strength in built heritage in parts of the County, particularly in the east, e.g. Athenry, Loughrea, Portumna.

As would be expected for a significant tourism destination, County Galway has a good selection of large and small visitor attractions and natural attractors (see 3.2.5 for more on outdoor attractors). Several attractions can be considered to be 'destination-level', attracting visitors specifically to them and significantly impacting the visitor economy in their local area through employment and associated benefits. These include Kylemore Abbey, Connemara National Park and Dún Aonghasa.

There are also quite a number that attract very low levels of visitor demand - highlighting the difficulty in achieving a balanced distribution of visitors and the fact that having a visitor attraction is no guarantee of attracting tourism (ref. Table 5). It is also worth noting again that most attractions/attractors are concentrated in the west of the County (Fig. 5).

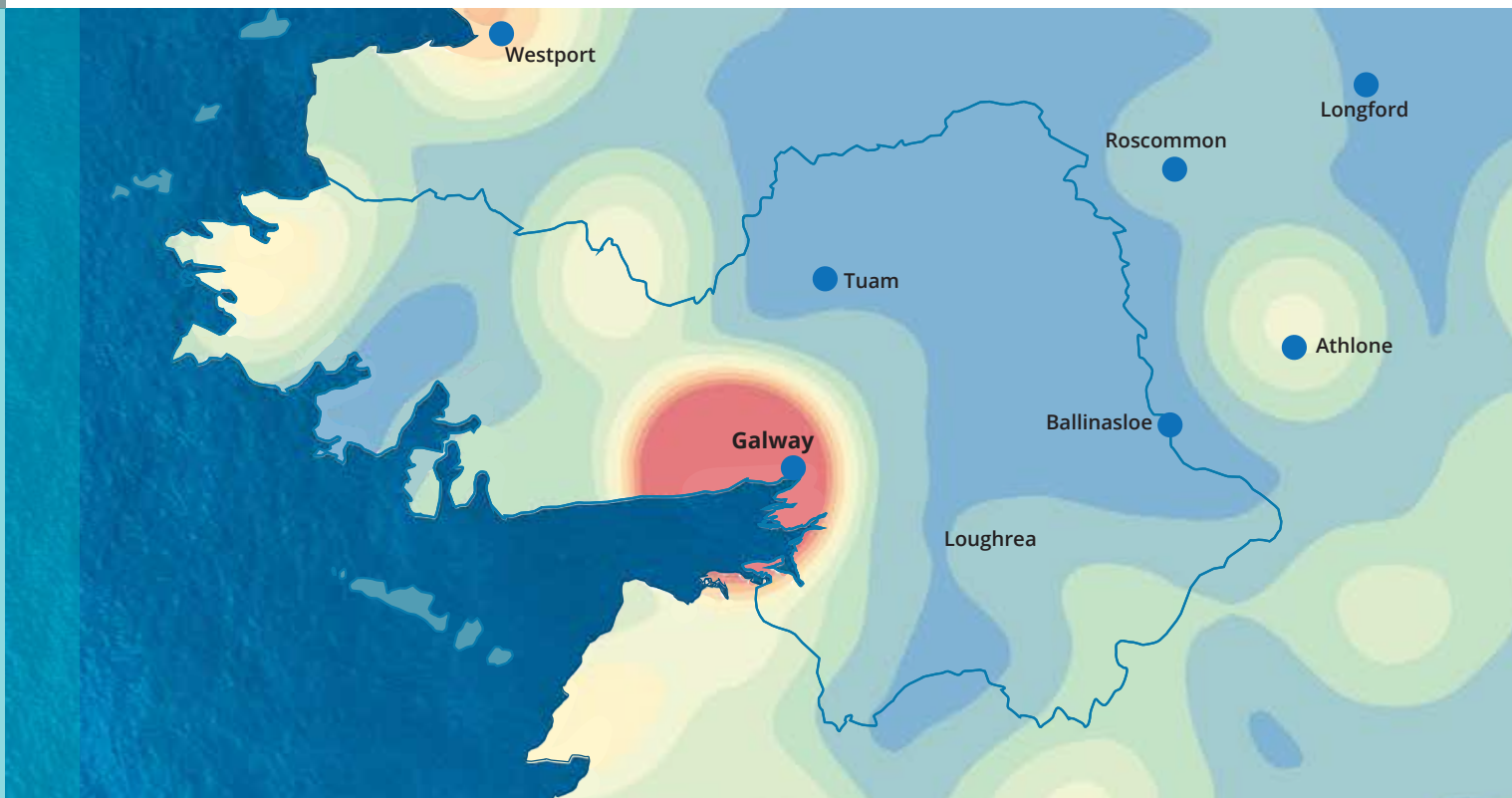
¹⁶ Sources: Fáilte Ireland, CHL Consulting and Galway County Council, excludes Galway City. Note that although Ashford Castle markets itself predominantly as a Mayo hotel due to its location in the village of Cong, it is included here as it pays rates to Galway County Council.

¹⁷ There are also numerous heritage trails throughout the County, including an ecclesiastical trail that now needs to be upgraded to a new platform.

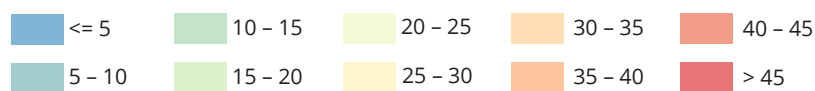


The role of Galway City as an 'attractor' in its own right, sitting at the centre of County Galway, can also be considered as a strategic asset. With its concentration of heritage and cultural experiences and attractions, dining, accommodation, retail, night life and transport options, it is a well-established hub. Driving distances from the City to other parts of the County mean that it is possible for visitors to base themselves in the City while taking day trips, either independently or by coach, to wherever they choose to go. This provides potential for lesser-known areas to tap into a large and established tourism market without needing to provide overnight accommodation, evening entertainment and other tourism supports. However, for more established areas of the County, this limits economic return as expenditure linked to accommodation and evening dining happens in the City. For these latter areas, it can also contribute to congestion at peak season, when large volumes of daytrippers can readily access key attractions by way of day coach tours.

FIG. 6: VISITOR ATTRACTION DISTRIBUTION¹⁸



Activities Distribution 20km



18 Source: Fáilte Ireland



TABLE 6: VISITOR DEMAND AT COUNTY GALWAY VISITOR ATTRACTIONS 2019¹⁹

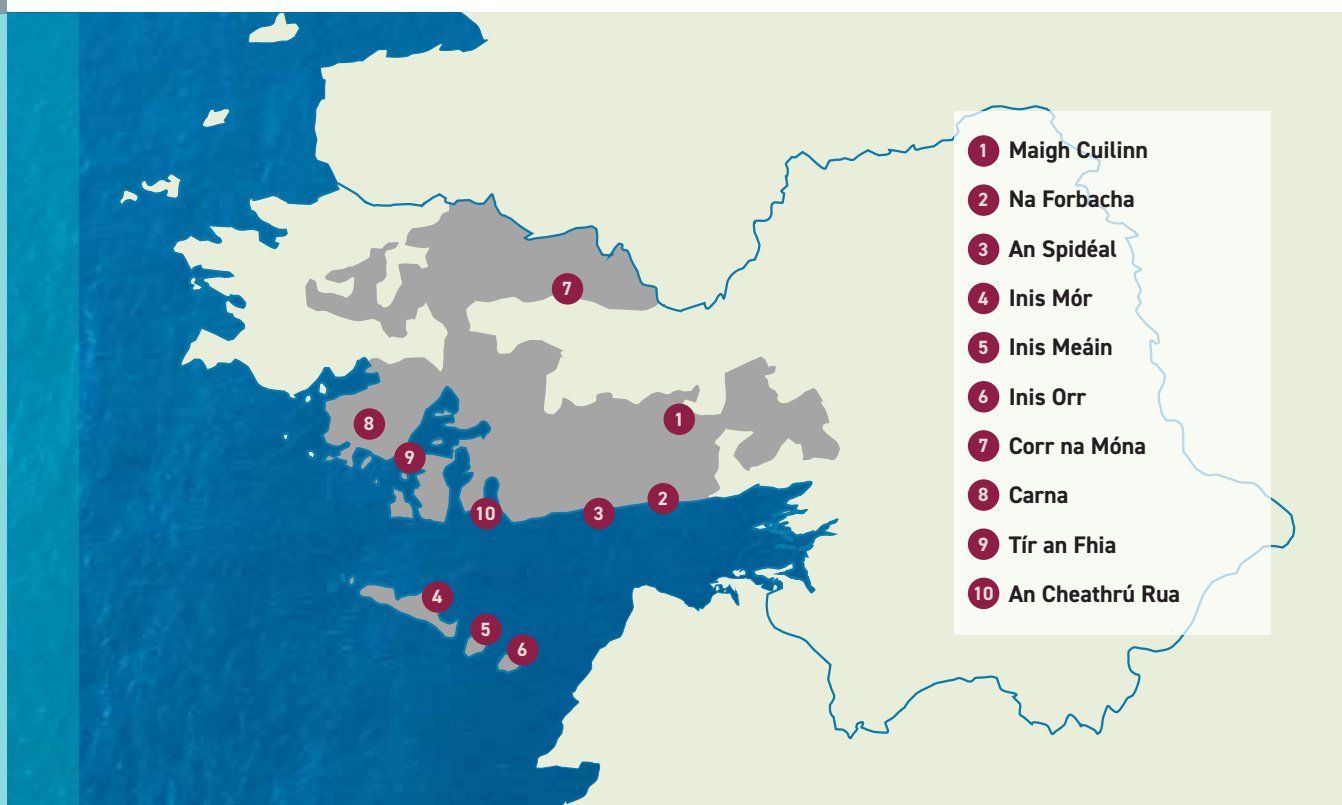
Attractions	Visitor Numbers
Kylemore Abbey & Garden	540,500
Coole Park	311,702
Connemara National Park	238,378
Dún Aonghasa	131,273
Turoe Pet Farm and Leisure Park	110,000
The Sheep & Wool Centre, Leenane	92,000
Pallas Karting	80,000
Dan O'Haras Homestead Farm and Heritage Centre	48,000
Dunguaire Castle	45,286
Connemara Crystal Visitor Centre	38,700
Aughnanure Castle	31,519
Ionad Cultúrtha an Phiarsaigh	25,134
Brigit's Garden	25,000
Portumna Castle	20,777
Rathbaun Farm	16,500
Connemara Smokehouse	12,000
Irish Workhouse Centre	11,500
Athenry Castle	10,595
Aran Goat Farm	5,000
Connemara Oyster Farm	2,000
Battle of Aughrim Interpretative Centre	1,200
Kiltartan Gregory Museum	1,000

¹⁹ Sources: Fáilte Ireland, AVEA, Galway County Council and CHL Consulting. Note: data for Coole Park is for 2021, NPWS.

3.2.4 The Gaeltacht and the Islands

Conamara includes large Gaeltacht areas, stretching from just outside Galway city out to Carna, northwards to Corr na Móna and into Mayo, and encompassing na hOileáin Árann (ref. Fig. 7). In addition to the outstanding scenery and heritage assets already mentioned across the County, in the Gaeltacht areas visitors have a unique opportunity to witness Gaeilge in everyday use and the ongoing integration of traditional arts, skills and crafts in Gaeltacht communities. Conamara also has one of the strongest traditional music scenes in Ireland with highly accomplished Sean Nós singers and dancers.

FIG. 7: GAELTACHT AREAS IN COUNTY GALWAY²⁰



There are also participative opportunities for tourists through a range of Gaeltacht festivals and events, as well as short and longer programmes for visitors of all ages in language, traditional music, dance and craft.

The County has four inhabited off-shore islands - Inis Oírr, Inis Meán, Inis Mór and Inisbofin, the first three of which are also within the Gaeltacht. The islands also offer a unique experience for visitors, in terms of way of life as well as the richness of landscape, seascape and biodiversity. For staying visitors, there is an opportunity to slow down and integrate into communities for whom the separation from the mainland is a very tangible reality around which tradition and lifestyle has evolved.

3.2.5 Festivals and Events

As previously referred to, County Galway has a rich cultural heritage and the support of the endorsed Galway County Council Arts Plan 2020-2024, the Culture and Creativity Strategy 2023-2027, as well as an existing lively calendar of festivals and events that attracts visitors and generates revenue for the local economy. For example, the Ballinasloe Horse Fair celebrated its 300th anniversary in 2022, and attracts approximately 80,000 visitors annually. Clifden Arts Festival - the longest running community arts festival in Ireland - reported 38% overseas visitors in 2016 and an average spend per visitor of over €800. In addition, Galway International Arts Festival, which although based in the City, increasingly presents work in the County, attracted 210,000 visitors in 2019 and had an economic impact of €29.5M.

²⁰ Illustration includes areas of south Mayo; Plean Straitéiseach Údarás na Gaeltachta 2021-2025



Year round, there is a high standard of cultural offerings in all artforms and a large resident artists community. The opportunity exists to further galvanise Galway's reputation as a culturally vibrant destination by identifying a number of shared strategic objectives that draw on the policy context, and mapping out actions that provide employment opportunities for artists and artistic producers/presenters while addressing gaps in the visitor experience in areas.

Specifically within heritage, festivals and events that are well-established and could be brought to the next level include Medieval Loughrea, Athenry Walled Town Day, Féile na gCloch and Cruinniú na mBád.

In addition, walking festivals such as the Connemara Mountain Walking Festival in Leenane and the Inisbofin Walking Festival are helping to attract visitors during the shoulder season (see also Section 3.2.6).

There are also a number of sporting/adventure events that bring valuable tourism to the County and help to raise the profile of the destination for more serious outdoor activity. These include the Connemara 10K, the Killary Swim and the Tour de Connemara.


Furthermore, the strength of food as part of Galway's heritage and culture in Galway is evidenced by the calendar of events that was part of the European Region of

Gastronomy 2018. Festivals such as BIA Lover, Clarinbridge Oyster Festival, Connemara Mussel Festival and the many agricultural shows demonstrate the opportunity for food to play an important role in tourism. The festivals offer an opportunity for small businesses including the creative and crafts sector to develop their products at markets (see also Section 3.2.7).

3.2.6 Outdoor and Adventure Activities and Amenities

Outdoor recreation is an area that is increasingly becoming the focus of development throughout Ireland, with funding through the Outdoor Recreation Infrastructure Scheme and other schemes, and is now the subject of a new National Strategy on Outdoor Recreation²¹. Galway, with its diversity of land and water, lends itself to becoming an internationally-recognised destination for outdoor activities and adventure tourism. From mountains that provide a training ground for serious mountaineers to more gentle hiking, casual cycling and equestrian it has long been a destination for visitors who want to spend much of their holiday time outside in natural surroundings. This is supported by considerable investment in Greenway and trail infrastructure around the County, and there are few areas in Galway now without easy access to a walking or cycling trail. This widespread availability makes the trail network particularly significant in comparison with other assets that are more concentrated in the west.

²¹ Embracing Ireland's Outdoors - National Outdoor Recreation Strategy 2023-2027 (November 2022)



The County's coastline is also a significant attractor for tourists. The County has twenty four beaches listed on the Environmental Protection Agency's Beach Guide²². Six of these are Blue Flag Beaches - including two inland beaches - and seven are Green Coast Beaches. Many of the beaches are in less-visited areas of the County and offer an opportunity for further enhancement as visitor destinations.

With 689km of coastline and several designated coastal blueways²³, the County also has a significant number of piers, harbours and landing points along the coast - 244, of which 88 are in Council ownership. The larger of these play an important role in facilitating fishing and transport but the smaller ones²⁴ - as well as those on rivers and lakes - have potential to provide more opportunities for recreational water use, whether by independent visitors or through activity operators. A strategy for the use of smaller coastal piers is underway in the Council²⁵ and will be important in facilitating greater access to the water.

In addition, the County has one of only four accredited inland Blueway Trails - the Lough Derg Blueway, which includes Portumna. The feasibility of developing another on Lough Corrib is currently being explored.

An audit of operators and facilities carried out as part of the Strategy development identified almost fifty businesses that provide visitors with an opportunity to be active outdoors. At least 20% of these provided guided/self-guided walking holidays and almost as many provided boat trips. Others offered bike hire, kayaking, scuba-diving and a variety or combination of outdoor adventure activities.

As with the wider pattern of tourism in the County, however, there are few activity providers operating in the north east. In addition, the majority are very small businesses that are not always easy to contact nor visible on the ground for casual visitors that might not think or know to search and book in advance.

3.2.7 Food and Craft

Dining and retail that is based on local artisan production is an important component of a holiday for many, and is particularly important for some of Ireland's target markets, e.g. overseas visitors. They also provide an opportunity for local revenue generation and support smaller producers, often in rural communities.

Galway has a long tradition of craft and food. In addition, the process of attaining the European Region of Gastronomy designation and establishing the BIA Innovator hub in Athenry confirms Galway's position as a leader in food production and dining experiences. In 2019 and 2020, the Galway County Council Discover Galway Food Experiences featured a list of 40 producers engaged in training and mentoring workshops. There is an opportunity to galvanise this further with the expansion of food networks, trails and the integration of production, retail and hospitality, as well as ongoing support from Galway County Council Tourism in the form of training and promotion. Furthermore, some of the projects funded under the Outdoor Recreation Infrastructure Scheme that focus on connecting, upgrading and signage would benefit from a next stage investment for outdoor power supply, environmentally sensitive lighting schemes and space for

²² www.beaches.ie

²³ Inishbofin, Killary Harbour and Mannin Bay.

²⁴ Taking cognisance of the needs of the fishing industry.

²⁵ <https://www.galway.ie/en/services/roads/marine/>





pop-up hospitality providers to elevate these landscape experiences from amenity to leisure destinations.

Finally, outdoor dining has been widely supported and funded in recent years due to restrictions on indoor dining during Covid19. With the easing of restrictions, many restaurants, cafés and pubs have continued with it as an extension of their customer experience and for the increased capacity it offers at relatively low capital expense. This will continue to be an important element of the food experience in the County for the coming years.

3.2.8 Angling

County Galway has long had a reputation as an angling destination and despite the fact that the market is not as strong as it was several decades ago, it is still popular among dedicated anglers, with Lough Corrib having a particular reputation for wild brown trout and with an estimated 1,500 angling boats on the Lake. The County has a diversity of fisheries, with waters under the responsibility of Inland Fisheries Ireland (IFI) to the west and the ESB for the Suck Valley, as well as privately owned lakes in the north west. In addition to brown trout, there is wild angling in mountain lakes, good sea and shore angling, and salmon fishing. At the time of writing, the IFI is finalising its Western Lakes Management Plan.

3.2.9 Sustainable Tourism

In addition to the nature-based experiences covered under the various headings above, there is a small base of dedicated eco-tourism and sustainable tourism experiences in the County. These operators have gone to considerable effort to ensure that their tourism businesses operate to sustainability standards, completing training and certification in that regard. There are currently 13 members of Sustainable Travel Ireland²⁶ (formerly Ecotourism Ireland). These would provide a useful starting point for a dedicated sustainable tourism group that could support the widespread embedding of sustainability principles aligned to international standards. In parallel, there are additional measures that need to be taken at the level of destination management²⁷. All measures are rooted back to the UN's goals for sustainable development - see Figure 8.

More widely, there is an increasing focus on, and investment in, a variety of recreational, tourism and infrastructure that supports more sustainable travel by both public and private sectors. This includes investment in waterways and small scale eco accommodation.

FIG. 8: UNITED NATIONS' SUSTAINABLE DEVELOPMENT GOALS



²⁶ <https://www.sustainabletravelireland.ie/who-we-are/>

²⁷ The Global Sustainable Tourism Council sets criteria for global standards in sustainable tourism and travel. Two sets of criteria have been developed, one for destinations and the other set for industry.



3.3 Establishing an Economic Baseline

While it is acknowledged that Ireland is a small country and visitors do not necessarily notice county boundaries, In order for Galway County Council to monitor and measure tourism within its jurisdiction as a support for development, it needs to be able to evaluate volume and value metrics, at minimum.

The situation to date in this regard is as follows.

- Data for Galway County and City are published as one set, i.e. there is no separation of data between County and City.
- As a result, the revenue/economic value of tourism in the County alone cannot be estimated using official published data.
- Visitor attraction data can be used to assess visitor flows in the County but depends on returns to Fáilte Ireland and the Association of Visitor Experiences and Attractions (AVEA) survey, which are not always strong.

In order to provide a starting point for the Tourism Strategy, it is possible to create a new approach to establish an economic baseline. The approach is summarised as follows.

- Establish robust volume metrics for tourism in the County using accommodation capacity and occupancy data. Table 7 illustrates how this can be achieved drawing on data from a number of existing sources.
- Establish economic value metrics using pro-rata distribution of Fáilte Ireland county data spend - as presented in Table 8.
- Visitor attraction and traffic count data can provide additional metrics relating to the patterns of visitor flow, including daytrippers.

In support of this approach, the Tourism Strategy offers an opportunity to introduce new measurement tools that will provide direct data from the sector - but will depend on participation from the tourism industry. This is discussed further in Section 7.

TABLE 7: ANNUAL ACCOMMODATION CAPACITY AND OCCUPANCY AS A BASIS FOR ESTIMATING OVERNIGHT TOURISM IN COUNTY GALWAY²⁸

	Bednight Capacity	Roomnight Capacity	Occ rate	Bednights
Total Hotels	4,577	1,670,605	65%	1,085,893
Guesthouse	271	98,915	55%	54,008
B&B	777	283,605	43%	121,496
Hostel	326	118,990	54%	63,969
Caravan and camping	538	196,370	39%	77,527
Self catering	194	70,810	45%	31,525
Welcome standard	1,525	556,625	43%	238,458
Airbnb	804	239,460	43%	125,718
Total	9,012	3,289,389		1,798,594

²⁸ There are several key assumptions underlying this calculation:

From available sources, hotel room occupancy in Galway City was 77% (room occ. rates for Galway City in 2018 estimated by Fitzpatrick Associates in report for FI – “Future Supply of Tourist Accommodation in Cork, Galway & Limerick”).

From IHF is figure of 65% for hotel room occupancy on Wild Atlantic Way (RTE News – “Hotel Sector Reports Mixed Results for 2019”)

FI supply room occupancy rates for different types of accommodation on Wild Atlantic Way - these have been applied to the Galway City stock (FI: “Performance of Tourism Accommodation January-June 2018p”)

For Galway County stock other than hotels, the Wild Atlantic Way room occ. rates have been adjusted by ratio of the hotel room occ. rates in City & County – i.e. 65%/77% = 84%

To adjust for different levels of double occupancy, as the City has a good bit of business travel while the County is mostly holidays, the total city rooms occupied have been adjusted by 1.6 and the County rooms by 1.8. This gives an adjusted estimate of the overall Galway tourist numbers of 58% in the City and 42% in the County.

These factors have been applied to the visitor numbers and revenue that were available at the time of modelling, which were 2019.

TABLE 8: TOURIST NUMBERS AND REVENUE FOR COUNTY GALWAY, EXCL. CITY

Tourists 2019	Overseas Tourists	Domestic Tourists	Total
Numbers	672,005	462,004	1,134,009
Revenue €m	223	89	312

This approach yields the following assessment:

- overseas tourists' average per capita spend = €332
- domestic trips' average per capita spend = €193
- a contribution of €1,700 per head of population²⁹

This average spend analysis suggests that there is scope to increase per capita spend by overseas tourists as the average spend along the Wild Atlantic Way is €551 and €397 in the Ireland's Hidden Heartlands³⁰. This will be achieved by a combination of initiatives that encourage longer stays and developing more opportunities to spend. However, this average spend for overseas tourists in County Galway is nevertheless at a healthy level. In the Burren and the Cliffs of Moher Visitor Experience Development Plan, for example, the average spend in County Clare is stated as €211 - the second lowest in the country and a strategic challenge for that area.

Spend from domestic trips aligns more favourably with regional norms, which are €210 for the Wild Atlantic Way and €164 for Ireland's Hidden Heartlands.

Based on this analysis of the volume and value of tourism exclusively in County Galway, its value in terms of Exchequer return can be estimated at over €71.8 million³¹. More importantly for Galway, however, is the knock-on effect that this direct expenditure by visitors has on the local economy. Apart from the businesses with whom visitors spend their money directly, others benefit indirectly from this additional revenue: suppliers of goods and services to businesses servicing visitors; employees who have more income to spend in the County; ancillary businesses that benefit from this increased expenditure by local residents.

²⁹ Galway County population 179,048, Census 2016.

³⁰ Draft Regional Tourism Plans, Wild Atlantic Way and Ireland's Hidden Heartlands, Fáilte Ireland

³¹ Fáilte Ireland notes that every €1m of tourism expenditure helps to support 27 tourism jobs and every €1 spent by tourists generates 23c in tax.

3.4 Key Findings from Industry, Community, Stakeholder and Staff Engagement

Developing the Tourism Strategy required detailed representation from stakeholders, lead agencies and collaborators in planning, development and tourism, and strategic alignment with infrastructure developments across the County is reflected in the Strategy and its accompanying Action Plan.

A wide number of agencies and organisations were given an opportunity to contribute, among them those listed here.

Stakeholder and community engagement took a number of formats, including an online survey and submission opportunity, direct conversations, and workshops. The workshops highlighted opportunities for optimising the visitor experience within geographic areas, which helped to inform tailored and locally-specific initiatives.

Engagement with stakeholders reflected the specific concerns of the geography and sector, but there were a number of common points.

MAIN CONSULTATIONS AND CONTRIBUTORS

Údarás na Gaeltachta
Fáilte Ireland
Waterways Ireland
Galway Local Enterprise Office
Incoming Tour Operators Association
BIA Innovator Campus
Comhar Caomhán Teo
GMIT / Atlantic Technical University
Western Development Commission
Coillte
Joyce Country Western Lakes Geopark
Clare County Council
Connemara & Árann
Roscommon Leader Partnership
Forum Conamara
Galway Rural Development
Inland Fisheries Ireland
Destination Lough Derg
National Parks & Wildlife Service
Mayo County Council
Regional Skills West

RÉALT NA FUISICHE



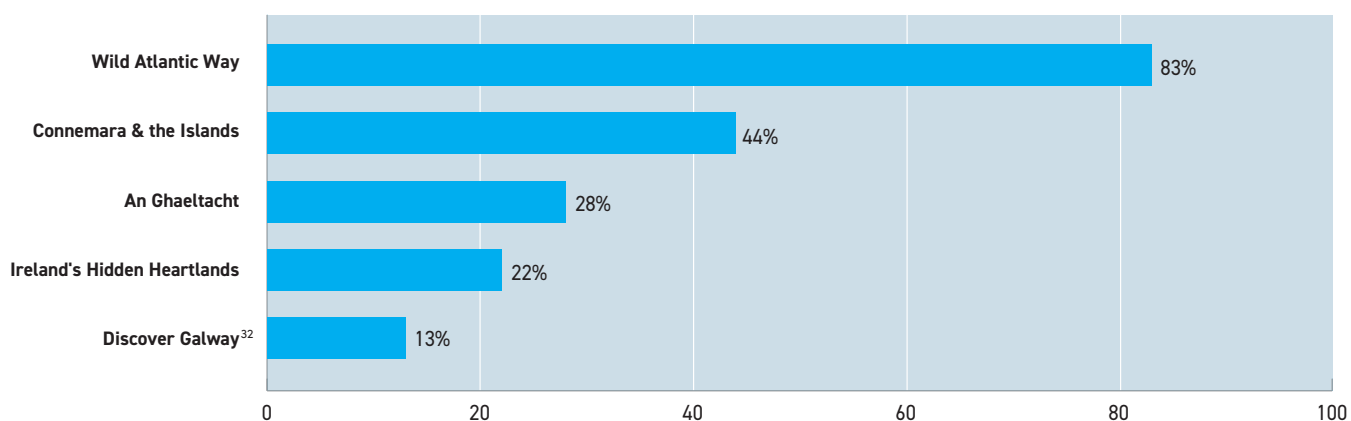
COMMON FEEDBACK FROM STAKEHOLDERS

- Generally, there is significant room for additional tourism growth in all areas but this needs to be balanced by visitor management in key locations, e.g. Inis Mór, Inis Oírr, Roundstone, during July and August.
- There is an appetite for initiatives that encourage visitors to get out of their cars and to explore by foot, bike, water and other slower and more sustainable means.
- There is a recognition that there is an opportunity to make more of the natural outdoors and of the investment in outdoor recreation infrastructure - improving access, connectivity and enhancing/developing existing 'assets'.
- There is scope to work with state landowners to further develop nature-based experiences and amenities.
- It was acknowledged that the new Strategy provides an opportunity for a cohesive approach to tourism.

The online survey attracted 199 responses and key findings are presented here.

KEY FINDINGS FROM ONLINE SURVEY

- Connemara and the Wild Atlantic Way are considered the County's strongest tourism assets, after Galway City.
- High costs and low all weather activities are considered the strongest deterrents to visiting the County.
- The need for a unified vision, while respecting the diversity of destinations, are seen as the priorities for the new Strategy.
- The Strategy is seen as an opportunity to support tourism businesses in terms of marketing, networking and skills development. Brands most commonly used by tourism businesses are shown below.



³² A new brand is currently being developed which will replace Discover Galway.

3.5 Key Findings from Mystery Shop Visits

As noted in Section 1, a comprehensive mystery shop programme was undertaken across the County. The more localised conclusions informed the Strategic Framework presented in Section 5. They provide a useful resource for further development within specific areas. Broader conclusions are summarised below.

BROAD CONCLUSIONS FROM MYSTERY SHOP

- Generally, the road network, signage and connectivity is good although there is limited public transport outside of main towns.
- There are too many different signs and brands in operation, especially in parts of Conamara.
- There is a wide variety of stunning and protected landscapes across the County.
- Some areas of high natural heritage value also attract high density tourism. This highlights issues of sustainability and indicates the imperative to distribute visitors more evenly.
- With an abundance of sea, lakes and rivers, there is potential for significant development in terms of water-based recreation.
- There is a good supply of tourism product in the west and southwest areas of Conamara, but very limited tourism product in east Corrib and north-east County areas.
- There are limited opportunities to 'stop and spend', which limits economic return to communities.
- South of Galway City there are a number of attractive small towns and villages but none performing as anchors for the area. There are opportunities to place more region-specific emphasis in areas where potential exists.
- There are specific issues relating to visitor volume, distribution and dwell-time on Inis Mór and Inis Oírr which would benefit from a collaborative and inter-county management plan with Clare County Council.
- In the east and south-east of the County in particular, there are opportunities to connect the conservation, management and promotion of built heritage experiences.
- Prices can be high in more tourism-focussed areas, including cost of dining out.





Gap and SCOT Analysis

4.1 Gap Analysis

The Gap Analysis in Table 9 builds on the Market Analysis previously presented and provides an understanding of how the County meets, or could meet, the motivations, interests and needs of target consumer groups, also highlighting areas where further development is required.

TABLE 9: GAP ANALYSIS: COUNTY GALWAY TOURISM

Primary Target Markets/Segments	Motivations, Interests and Needs	How does Galway perform?	Gaps?
Independent Touring Visitors	<ul style="list-style-type: none"> Culture and heritage Attractive towns, villages and scenery Independent discovery Authenticity High quality accommodation and dining An opportunity to get off the beaten track and under the skin of a destination 	<p>Generally a good fit for this segment, especially in the south west and in Conamara. Coastal scenery is a major attraction.</p>	<p>There is a lack of tourism-relevant attractions, activities and other product in particular areas, including west of N84 and north of M6, and in proposed Geopark area.</p> <p>Also a lack of retail and casual dining/cafés in less-visited areas.</p> <p>Insufficient supports, e.g. accommodation, toilets, in some gateway towns.</p>
Outdoor Actives (casual participants)	<ul style="list-style-type: none"> Opportunities (trails, trailheads, launch areas and supporting tourism/marketing information) for self-guided walking, hiking, cycling, watersports and other outdoor activities. Accommodation and dining near activity areas that cater for outdoor enthusiasts. 	<p>A good fit for this segment but improvements needed.</p> <p>Plenty of walking/cycling trails in place and/or in planning.</p>	<p>There is abundance of opportunity for water-based recreation on rivers, lakes and sea, but access points are not always easily discoverable nor always maintained.</p> <p>Suitable accommodation and dining is not always available near activity areas (e.g. key points along Greenway routes).</p>

Primary Target Markets/Segments	Motivations, Interests and Needs	How does Galway perform?	Gaps?
Domestic Families	All-weather activities and attractions catering for a wide range of ages and abilities. Family-friendly dining and accommodation. Equipment hire, taster lessons, camps, 'edutainment' opportunities	The County has a good base of self-catering accommodation, which suits this segment, and is generally a good fit but there is scope to develop and price can be an issue. Coastal locations are always attractive for this segment.	Improvements needed in provision and co-ordination of outdoor activities, including equipment hire, locations for water access, lessons. More rainy day facilities and child-focussed experiences at heritage sites.
Domestic Adult Urban Weekend Breaks	Good value and good quality accommodation and dining, primarily in towns that are within easy travel distance, with things to do during the day (e.g. outdoor activities, boat trips, shopping, wellness).	The County is not a good fit for this segment, apart from weekend breaks in association with events/festivals (e.g. Clifden).	More development of town-based experiences needed in larger towns, especially those on the rail network.
Outdoor Actives (dedicated participants)	As the focus for this segment is on the activity, the primary need is access to the physical space to engage in the activity, e.g. water, trails, mountains. Accommodation and food needs to align to and support that primary focus.	See casual participants above.	See Outdoor Actives (casual participants) above. Marketing and information. Other gaps for this segment include clarity over right of access to land and water, easily discoverable specialist guides (people & information) and luggage transfer arrangements.
General Coach Tours	Attractive scenery, good road network, hotels that can cater for groups and interesting stops/locations suitable for groups, with coach parking, adequate toilets and refreshments.	A good fit for this segment	Management of coach traffic and congestion in particular areas at peak season to avoid poor visitor experience
Special Interest Group Tours	Needs depend on interests, e.g. Gaelige, heritage, biodiversity, social. General needs relate to having interesting places to visit, good quality accommodation and food, and available expertise on area of interest.	A good fit for this segment	Marketing and information
Daytrippers	Easy access to locations where there is something interesting to do and see.	Galway has a number of established daytrip destinations in the west of the County.	Management of daytrippers during peak season in popular areas.

Primary Target Markets/Segments	Motivations, Interests and Needs	How does Galway perform?	Gaps?
Meetings, Incentive and Events	Interesting, authentic, vibrant locations with suitable venues that can cater for large and small groups with attention to detail and high quality in all aspects. Easily accessible from international arrival point.	The County has the potential to cater for incentives in particular, but travel distances are likely to be a deterrent for the meetings and events segments.	Marketing and coordination; identification of interesting venues and operators who can provide high-quality experiences.
Visitors with Disabilities/Limited Mobility	Needs depend on interests - this segment can be considered a sub-segment of all the others. Common needs included facilities, services and experiences that are universally accessible.	Potential to cater for a greater number but needs to expand capacity in this area and provide clear information.	More universal access points for water; more universal access experiences and services. Provision of accessible information. Principles of Universal Design should be integrated in place making and public realm projects.



4.2 SCOT Analysis

The SCOT Analysis summarises key Strengths, Challenges, Opportunities and Threats for tourism in County Galway as a whole. In undertaking a SCOT Analysis, a number of key points are to be considered, as follows.

The Strengths and Challenges of the SCOT relate to the internal dynamics of tourism in County Galway and are based on what the destination does well, the resources it has available. They will, by necessity, vary by geography within the County - a point that is further developed in the Strategic Framework presented in Part 2.

The Opportunities and Threats relate to external factors over which the destination has no control - but of which the destination needs to be aware and to which it needs to respond. There will be a high degree of overlap between those identified for County Galway and those that are relevant to Ireland as a whole, given the small size of the country.

TABLE 10: SCOT ANALYSIS: COUNTY GALWAY TOURISM



Strengths

- The natural environment, including (but not limited to): the wild and diverse inland and coastal scenery, Blue Flag and Green Coast beaches, biodiversity, the Burren, Twelve Bens, River Shannon, Lough Corrib, Lough Derg, bogs
- The People, as experienced through communities, activities and events
- Gaeltacht culture and heritage, including language, music, dance and craft
- Contemporary arts and culture
- Recognisable 'brands', particularly of Conamara, Galway and the Burren.
- Attractive towns and villages
- Some established tourism destinations with experienced industry, e.g. Conamara
- Heritage sites, including established ones such as Dún Aonghasa but also less known including Ross Errilly and Kilmacduagh
- Accommodation and food (in some areas)
- Investment in public realm and trail development across the County
- Boating tradition
- Piers and harbours in Council ownership
- Strong community and heritage groups in some areas



Challenges

- Lack of overall co-ordination of tourism industry across the County
- Mix of mature and emerging destinations
- Lack of connectivity, public transport, in rural areas
- Peak season congestion in certain areas, particularly west Conamara and Oileáin Árann
- Lack of accommodation and tourism product base in general in parts
- Tourism funding
- Lack of awareness of East Galway
- Lack of development around recreational water access (apart from the Shannon)
- Weakness in tourism demand October-April



Opportunities

- Increased consumer engagement in outdoor activities
- Increase in emphasis on sustainability
- Increase in exploration of unknown areas by domestic visitors
- Increased funding for relevant infrastructure, town development and trail development
- Regional brands: Conamara, Wild Atlantic Way, Ireland's Hidden Heartlands, Shannon and Lough Derg
- Interest in alternative accommodation, e.g. glamping, Recreation Vehicle
- Increasing connectivity through technology
- Increased consumer awareness of health and wellbeing
- Growth in digital nomads: opportunity to target these with development of GTeic and other remote working hubs



Threats

- Staff shortages
- Cost: Inflation / cost of living reducing spending capacity and pushing prices up / fuel costs impacting touring visitors; also cost of doing business for the industry
- Changes to international travel: Brexit impact on travel from UK; longterm impact of changes in travel patterns resulting from Covid and related restrictions
- Competition from emerging tourism destinations in Ireland with increasing investment in infrastructure and experiences, offering better value





STRATEGIC RESPONSE

2





5 Vision and Strategic Framework

5.1 The Vision

The Vision for tourism in County Galway plays to its strengths as a county that offers richly layered natural and built heritage experiences steeped in generations of tradition, alive with vibrant contemporary culture. It also reflects the challenges we intend to surmount over the duration of the Strategy, including the elevation of areas where tourism is underdeveloped, as well as the opportunity presented by a more integrated offering to the visitor through a County and City destination brand that expresses the shared characteristics of the County. It is intended to provide a succinct unified statement of intent for the future that will guide the development and management of tourism. It is not a marketing slogan.



The Vision Statement is articulated as follows.

“County Galway is Ireland’s leading cultural and natural heritage tourism destination - a vibrant and integrated destination that respects its unique culture and environment, proudly sharing it with visitors in engaging ways.

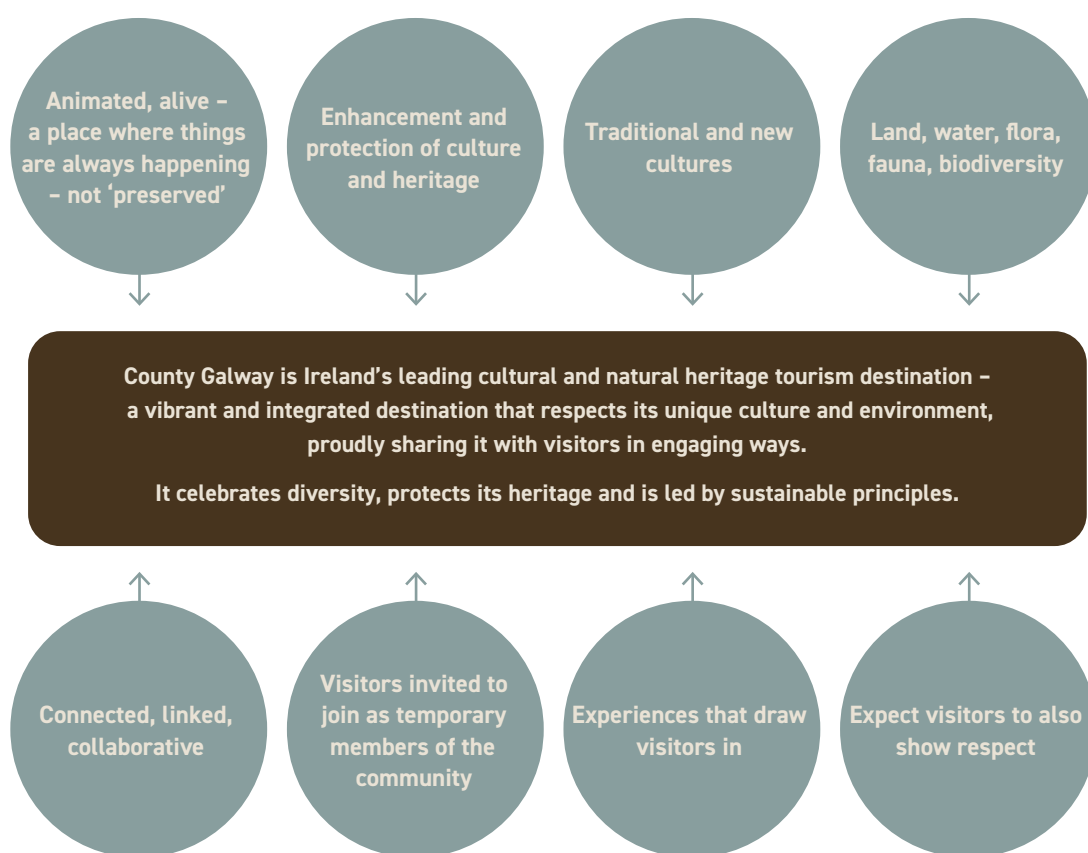
It celebrates diversity, protects its heritage and is led by sustainable principles.”





A studied reading of the Vision will reveal the layers of meaning contained within it. Figure 9 provides an overview of its implications for the destination, unpacking the key words that provide a focus for development.

FIG. 9: UNPACKING THE VISION STATEMENT



5.2 Targets

Given the uncertainty of recent years, and the current volatile nature of international travel, a modestly optimistic approach has been taken to setting targets for the Strategy - one that sees growth of 3% in overseas tourists to the County and 5% growth in domestic trips over the eight years³³. This growth is expected to happen in the second half of the lifetime of this Strategy, with the first half being a period of re-establishing pre-2019 levels of tourism. What is equally important is that this growth in tourism carries with it an increase in shoulder and off-season business and growth in tourism to less visited areas of the County. To that end, many of the initiatives in this Strategy support development that strengthens less-visited areas and encourages slower, more sustainable, tourism.

Higher yield from tourism is also important. As mentioned earlier, current per capita spend in the County is currently below average for overseas tourists and therefore a higher growth target has been set for that particular metric - underpinned by actions to attract higher value visitors, to encourage staying visitors within the County and to enhance revenue generation. Average per capita spend for domestic trips, while more aligned to the regional averages, also shows scope for growth and more modest growth targets have been set here.

In order to monitor these targets, qualitative metrics are recommended as well as new measurement tools that will allow assessment by area within the County - see Measurement in Section 7. The targets should be reviewed at midterm in line with national performance and targets.

TABLE 11: VOLUME AND VALUE TARGETS FOR TOURISM IN COUNTY GALWAY 2031

Metric	Current	% Growth	Target 2030
Domestic Trips	462,004	4%	485,000
Domestic per Capita Spend	€193	5%	€203
Overseas Tourists	672,005	3%	692,000
Overseas per Capita Spend	€332	6%	€352
Total Tourist Numbers	1.1m	-	1.2m
Total Tourism Revenue	€312m	-	€342m

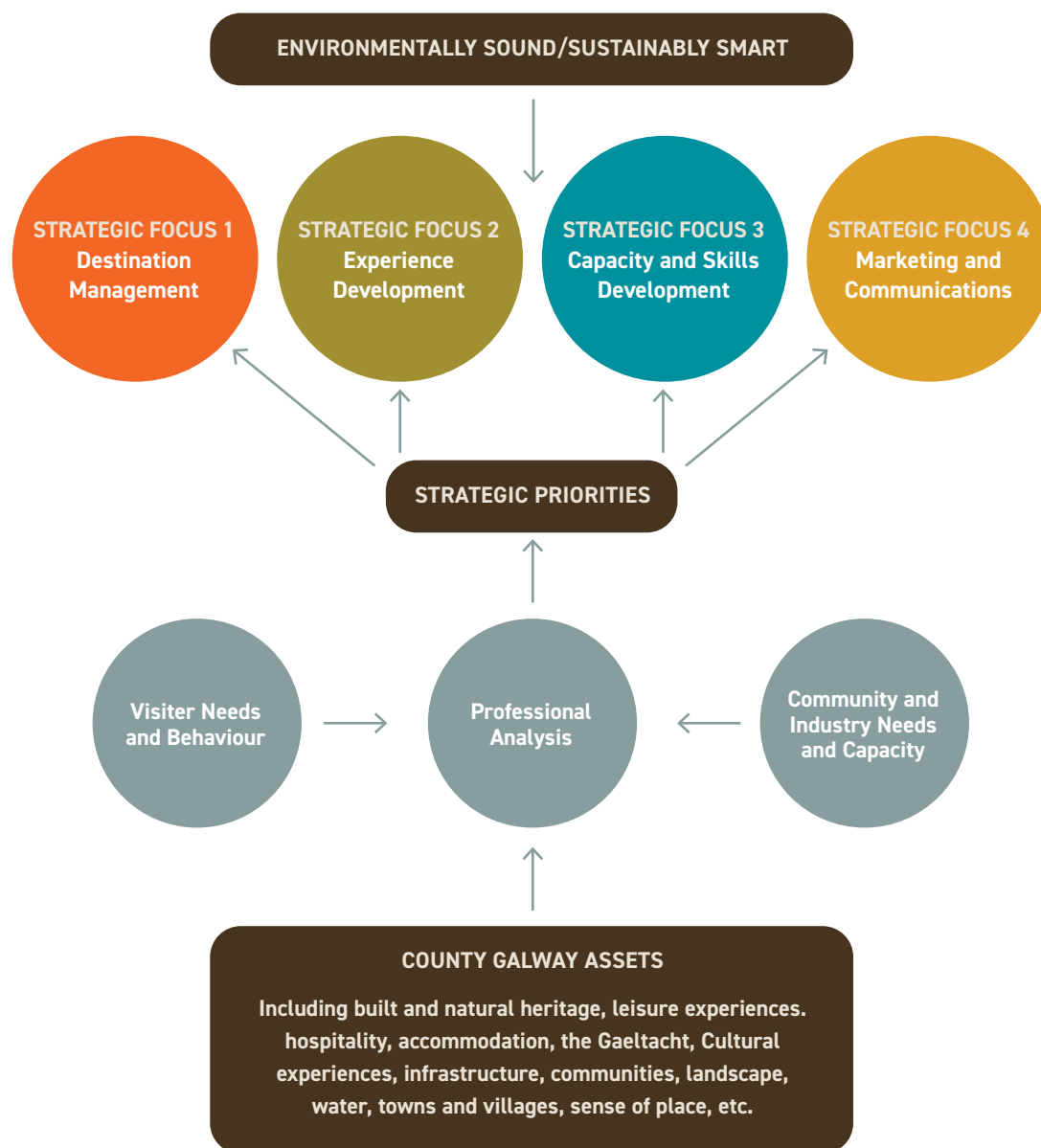
³³ At the time of analysis, recovery scenarios set out by ITIC post-Covid have been overtaken by the rapid reinstatement of international air travel and the equally rapid return to travel of consumers. However, the more recent energy crisis, ongoing difficulties around Brexit and increasing inflation are all factors that will act against this return to strong demand for travel. The ETC is currently forecasting that international travel is not expected to return to 2019 levels until 2025, and ITIC forecasting that it will be 2026 before Irish tourism achieves 2019 levels. This is further supported by Fáilte Ireland in their Regional Tourism Development Strategies, where a return to 2019 levels of tourism is not expected until 2026.

5.3 Strategic Framework

The Strategic Framework provides the structure that will enable the destination to achieve its Vision. The Framework integrates the perspectives of consumers, industry and communities with the results of professional analysis (see Fig.10), and provides coherence for activity and investment over the eight year duration of this Strategy.

Four areas for strategic focus are identified in the Framework. An explanation of each of these is provided overleaf and the Action Plan is structured accordingly. Monitoring and measurement are also important and are integrated across all areas. Please note that the order in which the four focus areas outlined below are presented does not reflect an order of priority. They are all equally important.

FIG. 10: FRAMEWORK FOR DELIVERING THE COUNTY GALWAY TOURISM STRATEGY



Strategic Focus 1 - Destination Management: Actions relating to the overall development and management of the destination, including issues such as signage, orientation, presentation and co-ordination. This theme also includes actions relating to specific destinations or zones within the County that have particular needs and characteristics.

Strategic Focus 2 - Experience Development: Actions relating to the development and delivery of visitor experiences that support the delivery of the vision and direction of this Strategy.

Strategic Focus 3 - Capacity & Skills Development: Actions that help to support the development and enhancement of the industry and others who provide tourism services and experiences.

Strategic Focus 4 - Marketing and Communications: This includes not only marketing of the destination but also communication with industry, stakeholders and the wider community.

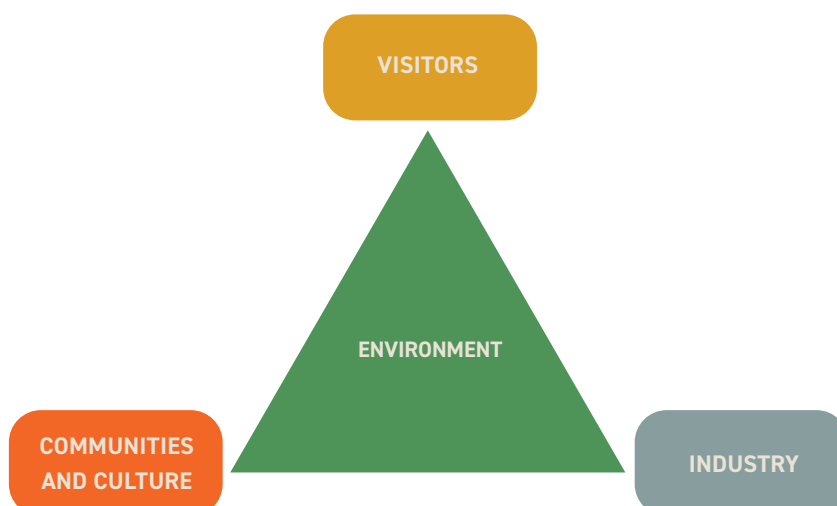
The priority for Galway County Council Tourism will remain the ongoing delivery of existing and new collaborative projects that offer major opportunities for tourism growth across the County. These include the Connemara and Aran Islands Visitor Experience Development Plan; the Lough Derg Visitor Experience Development Plan 2020-2024; and The Burren and the Cliffs of Moher Visitor Experience Plan; the River Shannon and Beara Breifne Way Tourism Masterplans; and the Athlone-Galway cycleway and Galway-Clifden Greenway.

GUIDING PRINCIPLES FOR SUSTAINABLE TOURISM GROWTH IN COUNTY GALWAY

A number of principles will help guide activities and interventions, ensuring future growth is sustainable.

1. Continue to prioritise delivery of major collaborative opportunities with strategic partners, including existing and future Visitor/Destination Experience Development Plans, Tourism Masterplans, and the Greenways.
2. Support the extension of tourists' length of stay and expenditure, and encourage exploration of less visited areas.
3. Prioritise the goal of fully sustainable tourism and align with national and local Climate Action Plans. (See Fig. 11).
4. Support Gaeltacht culture, language and communities.
5. Prioritise the harnessing of existing natural and built assets, outdoor tourism and ongoing investments, especially in blue and green infrastructure.
6. Establish tourism as a core economic activity across the County and promote the growth of tourism, including in less-visited areas, through the development of existing and new tourism experiences and destinations.
7. Develop a zone approach that will enable the targeting of relevant interventions at a more local level.
8. Introduce and support innovation.
9. Enhance industry, community and stakeholder collaboration.
10. Improve universal access in tourism experiences.

FIG. 11: VICE MODEL FOR SUSTAINABLE TOURISM DEVELOPMENT



Sustainable tourism takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.
(UNWTO)

5.4 Tourism Development Zones

While the priority will remain the delivery of major collaborative projects, there are also more area-specific opportunities and challenges that would benefit from an approach that addresses these directly. This approach is outlined below.

5.4.1 Identifying Tourism Development Zones

It is evident that tourism capacity and potential is not evenly distributed across the County. Tourism has traditionally developed along the most striking swathes of landscape and coast, further supported by the development of the Wild Atlantic Way touring route. This means that the majority of tourism assets, experience development and industry maturity is also concentrated in these areas, with more recent development activity along the River Shannon and particularly focused around Lough Derg. Altogether, this suggests that a more nuanced approach to tourism development is required across the County - one that acknowledges similarities where they exist but also allows for a more strategic flexing of interventions depending on the characteristics of specific areas. As a result, it is recommended that a zoned approach be taken to some elements of the tourism development strategy.

A number of development zones have been identified, using the following criteria.

1. Maturity - of destinations.
2. Sustainability - environmental, community, economic.
3. Assets - making the best of existing & elevating untapped
4. Industry & community capacity - operators to deliver, how to develop local capacity.

Level of Maturity

Based on Fáilte Ireland's destination maturity model, County Galway contains destinations at all four levels of maturity.

- **Aspiring Destinations:** These have a developing tourism profile and need to focus on developing visitor infrastructure and product. They benefit from establishing networks and capacity building. Most of East Galway falls into this category.
- **Pioneering Destinations:** These have emerging domestic market recognition and need to focus on developing product and supporting experiences. They benefit from having a clear USP and strategy. South east Galway areas bordering on Lough Derg fall into this category.
- **Progressing Destinations:** These have good domestic and developing international recognition, and need to focus on developing best in class experiences to attract new visitors. They benefit from focussing on destination competitiveness. Conamara and south west Galway (the Galway Burren) fall into this category, although some specific areas can be considered under the fourth category below.
- **Enhancing Destinations:** These are established destinations with high international recognition that need to focus on experience innovation and visitor dispersal. While Conamara could be considered as falling into this category, not all areas of Conamara are as well-known as others, for example towns like An Spidéal and areas such as Ceantar na nOileán and Corr na Móna.

Sustainability

As also noted previously, County Galway has a considerable number of protected and special areas in terms of biodiversity, landscape, waterbodies and Gaeltacht culture. In addition, there is evidence that some areas are under threat at particular times of the year when it comes to tourism demand. It is critical that these factors be taken into account in planning for tourism development and management, particularly in the areas of the Gaeltacht, the four off-shore Galway islands, Clifden, the proposed Joyce Country Western Lakes Geopark, the primary water bodies and coastal areas, and other designated environmental areas.

Assets

On the basis of accommodation, none of the towns in the County can be considered year round tourism destination towns, i.e. towns with bed capacity in excess of 1,000.³⁴ Clifden, however, can be considered a seasonal destination town, having more than 500 bed spaces. Other significant towns in the County - Portumna, Ballinasloe, Tuam, Uachtar Árd, Gort and Athenry - have minimal bed capacity and would require further development to be considered destination towns.

A number of towns have direct rail connections. On the Dublin to Galway route, these include Ballinasloe, Woodlawn, Attymon, Athenry and Oranmore. On the Limerick to Galway route, they include Gort, Ardrahan and Craughwell.

In addition, as noted earlier, outside of the key coastal areas of Conamara, tourism product is sparse. However, some areas of the County benefit from significant natural and heritage assets that are being developed for visitors, or which have yet to be developed. These include the areas around Lough Derg and the Shannon, the Burren, the Joyce Country Western Lakes Geopark, Lough Corrib and the Beara Breifne Way.

Finally, Tuam - due to its location, size, built heritage and developing reputation for food - has the potential to be a gateway/hub for the north-east.

Industry & Community

There are also development initiatives/plans underway in a number of areas that are laying the basis for future growth, and this needs to be taken into account when considering industry capacity. A number of towns have potential to develop as hubs within existing larger strategies and plans, e.g. Portumna, Ballinasloe, Uachtar Árd, Gort, Athenry and Oranmore, and therefore warrant particular attention. There are also a number of community-based recreation, heritage and tourism initiatives underway in many areas, including Athenry, the Suck Valley Way, Aughrim, Milltown, An Spidéal and An Cheathrú Rua.



³⁴ Definition of a destination town based on Fáilte Ireland's *Tourism Destination Towns Guidelines*.

5.4.2 Introducing the Tourism Development Zones

Six Development Zones are proposed. The Zones provide a structure for integrated and focussed interventions that match their current needs and future tourism potential. They are not marketing destinations.

Each Zone has at least one anchor town that provides or will provide essential services and facilities, providing a base for tourists and acting as a gateway to the wider cluster of towns, villages and countryside around it. Some of these towns can pivot towards more than one Zone, depending on their particular characteristics and location.

As mentioned previously, the Zones are intended to support a more nuanced delivery of interventions but the 'borders' between one Zone and another are blurred, allowing for a permeation of development between Zones according to need and opportunity. Areas close to Galway City, for example, will naturally benefit from their location as portals that allow visitors to migrate between rural and urban experiences.

The Zones will require a co-ordinated approach. In order to avoid the establishment of new structures, this approach will build, in the first instance, on existing networks, town teams, etc., gradually expanding their focus over the duration of the Strategy to encompass the full area of the Zone. New proposals for projects and activities within each Zone will be considered in the context of the Zone's particular characteristics and needs, and seek to find connectivity with the anchor town/s.

These Zones are presented in the following pages in more detail, including strengths, challenges and opportunities that are further developed into specific actions in the Action Plan, Appendix 8.1. Figure 12 provides an outline illustration.

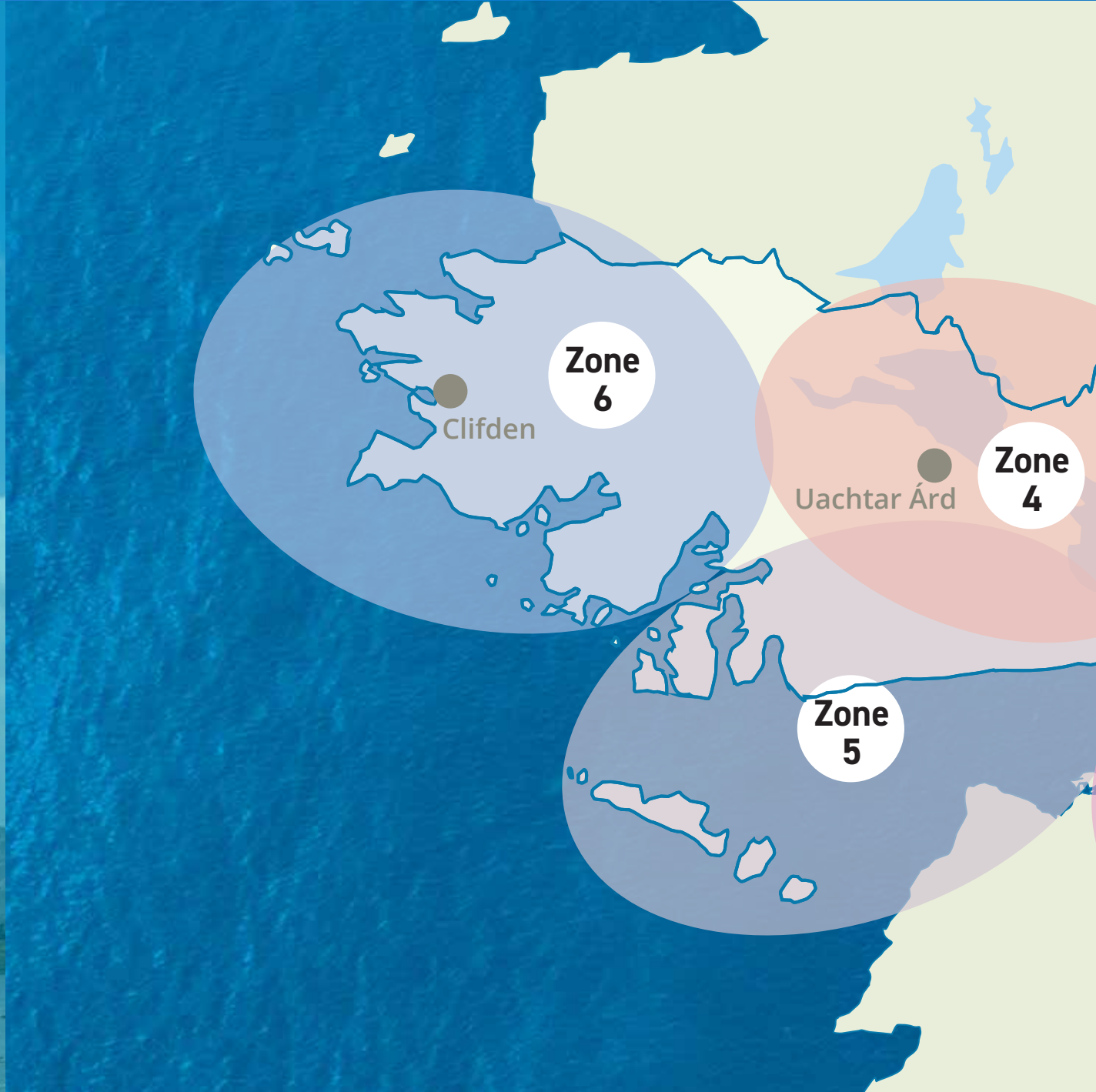
It should be noted that opportunities that are shared across the entire County are not captured in the pages that follow but are addressed as common areas of action in the Action Plan. These include shared opportunities relating to outdoor recreation.

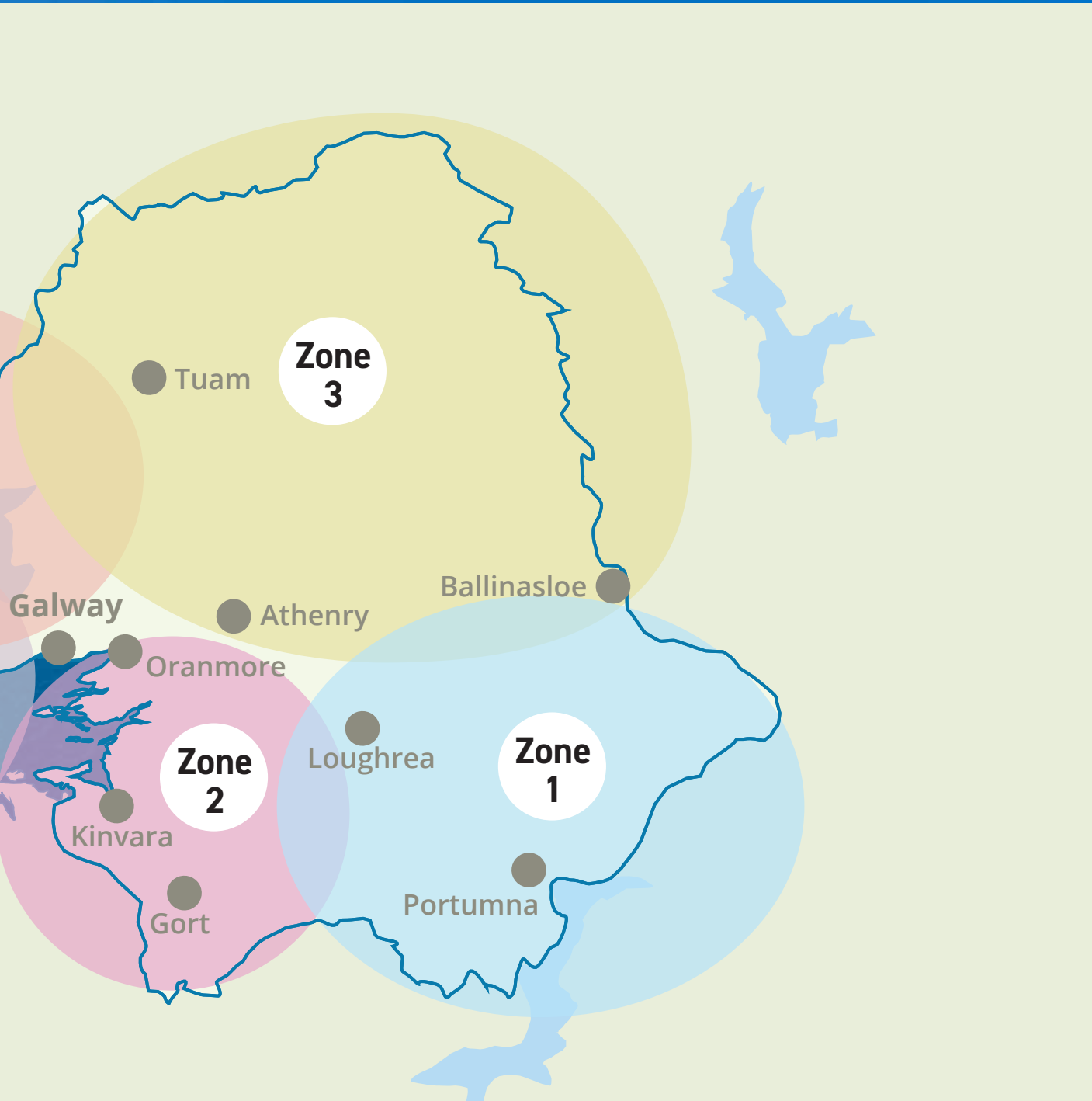
“Policy interventions that target administrative boundaries or economic sectors in silos miss opportunities to unlock synergies that meet broad policy objectives for rural regions and countries.” (OECD)³⁵



35 Issues Note for the Rural Development Conference, Cavan, Ireland, 28-30 September 2022

FIG. 12: ILLUSTRATING THE STRATEGIC TOURISM DEVELOPMENT ZONES







<p>ZONE 1: SOUTH EAST GALWAY</p>	<p>Zone 1 encompasses south east Galway (south of the M6), including Loughrea and Portumna. It has been identified by Fáilte Ireland as a 'Pioneering Destination'.</p>
<p>STRENGTHS AND CHALLENGES</p>	<p>Zone 1 orients towards the Shannon and Lough Derg, connecting into the Tourism Masterplan for the Shannon, the Lough Derg Visitor Experience Development Plan and the Beara Breifne Way Tourism Masterplan - all of which have considerable momentum behind them and provide structures from which to develop a larger focus on the wider south east area.</p>
<p>OPPORTUNITIES</p>	<ul style="list-style-type: none"> • Ongoing implementation of the Lough Derg Visitor Experience Development Plan 2020-2024 and Portumna development plan. • Beara Breifne Way Tourism Masterplan: Experience development and connectivity along the southern end of the Hymany Way, including industry and community activation. • Athlone-Galway cycleway project, including industry and community activation in advance of, during and post construction. • Wider integration of tourism into public realm, regeneration and transport plans for Loughrea and Portumna. • Further development of collaborative projects with Waterways Ireland, and Tipperary and Offaly County Councils, including Meelick Weir and Banagher. • Blue Flag beaches at Portumna and Loughrea. • Ongoing developments under Ireland's Hidden Heartlands.





Zone 2

<p>ZONE 2: SOUTH WEST GALWAY</p>	<p>Zone 2 encompasses south west Galway, including, Oranmore, Clarinbridge, Gort, Kinvara and Craughwell. It can be considered a 'Progressing Destination', although parts of the Zone are less developed.</p>
<p>STRENGTHS AND CHALLENGES</p>	<p>Zone 2 orients towards the Burren and the Wild Atlantic Way, and is readily accessible via the M18, and also has train connections. It links into the Burren Lowlands and the Burren and Cliffs of Moher Visitor Experience Development Plan.</p> <p>Gort can act as the primary anchor town. Kinvara and Clarinbridge are also important as alternative smaller hubs on the Wild Atlantic Way, as is Oranmore which can act as a gateway to/from Galway City and also has potential to maximise the new Greenway.</p> <p>The area has potential to cater for both general touring visitors along the Wild Atlantic Way, as well as those looking for a base and those with more niche interests in biodiversity, landscape, heritage and watersports.</p> <p>The key challenges for this area is to continue to focus on product and experience development while also enhancing the quality of existing experiences in order to build on growing international awareness of the Wild Atlantic Way and the Burren.</p>
<p>OPPORTUNITIES</p>	<ul style="list-style-type: none"> • Greater integration between Burren Lowlands and the Burren and Cliffs of Moher Visitor Experience Development Plan. • Wider integration of tourism into public realm, regeneration and transport plans for Gort, Kinvara, Oranmore, Clarinbridge and Craughwell. • Athlone-Galway cycleway project, including industry and community activation in advance of, during and post construction.



<p>ZONE 3: NORTH EAST GALWAY</p>	<p>Zone 3 encompasses the large area of north east Galway that stretches east from the M17, north of the M6 and west of the Suck Valley. It includes Athenry, Tuam and Ballinasloe. It has been identified by Fáilte Ireland as an 'Aspiring Destination'.</p>
<p>STRENGTHS AND CHALLENGES</p>	<p>Athenry, Tuam and Ballinasloe can act as anchor towns for Zone 3 - three of the larger towns in the County that have unrealised potential to act as tourism hubs, albeit on a smaller scale than those in more visited parts of the County. They also benefit from rail access. Additional small towns and villages have potential for development as hubs for outdoor recreation, including Milltown and Ballygar.</p> <p>This Zone is in the early stages of tourism development and therefore needs to focus on establishing a foundation in terms of infrastructure, services/facilities and networking. Given its limited range of tourism experiences and accommodation, introducing new and more innovative experiences would be a good fit for this Zone and would help to raise awareness as well as attract niche markets. Examples include commercial hides and other nature-based experiences, glamping, RV stops, recreational experiences for people with disabilities, supports for walkers.</p>
<p>OPPORTUNITIES</p>	<ul style="list-style-type: none"> • Beara Breifne Way Tourism Masterplan: Experience development and connectivity along the Suck Valley section of the Hymany Way, including industry and community activation. • Athlone-Galway cycleway project, including industry and community activation in advance of, during and post construction. • Wider integration of tourism into public realm, regeneration and transport plans for Tuam and Athenry in particular. • Also potential to integrate tourism into current and future public realm, regeneration and transport plans for Ballygar, Glenamaddy, Mountbellew, Milltown, Dunmore and Moylough. • Built heritage assets, e.g. in Athenry • BIA Innovator Campus in Athenry. • Universal access development in Ballinasloe. • Repurposing of Bord na Móna land for recreation and sustainable projects. • Opportunities presented by Just Transition Fund.





Zone 4

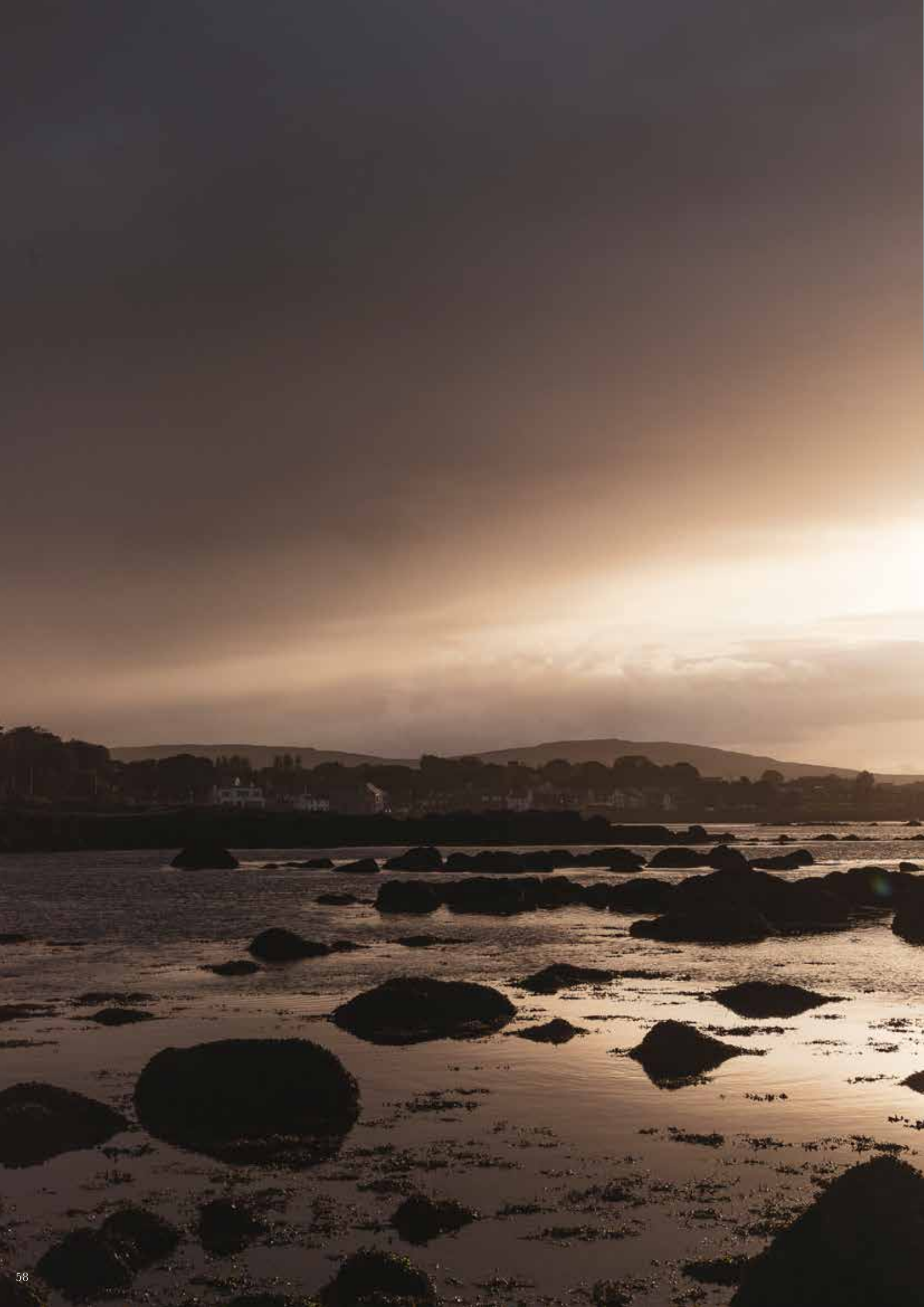
<p>ZONE 4: EAST CONAMARA AND LOUGH CORRIB</p>	<p>Zone 4 encompasses east Conamara, stretching east of Maam Cross and west of the M17, and including Lough Corrib. It includes Uachtar Árd, Headford, Maigh Cuilinn, Bearna, Baile Chláir/Claregalway and Clonbur/An Fhairche. Although Conamara generally is considered a 'Progressing Destination', there are areas within it that are less developed.</p>
<p>STRENGTHS AND CHALLENGES</p>	<p>Uachtar Árd can act as the anchor town for Zone 4, but Headford, Maigh Cuilinn, Bearna and Clonbur/An Fhairche have a role to play as smaller hubs that facilitate active visitors in particular. Although Conamara is well-established and the area around Uachtar Árd was previously a popular destination for anglers, this Zone will benefit from additional focus on developing core assets and experiences.</p> <p>A concerted and co-ordinated effort to develop Lough Corrib for recreation will be of significant benefit to towns and villages in the area and will maximise and protect this valuable natural asset.</p> <p>There should also be support for the Joyce Country Western Lakes Geopark application for UNESCO status and collaboration on further development of 'micro' destinations within the area.</p> <p>Clonbur/An Fhairche has a particular strength in walking from which other small towns can learn (e.g. Walkers Welcome scheme). Maigh Cuilinn is well-positioned on the developing Galway-Clifden Greenway to grow as a hub for walkers and cyclists.</p> <p>The further development and integration of Ross Errilly is of strategic importance to building awareness of Headford and supporting its growth as a small tourism hub and gateway to east Conamara and the proposed Geopark.</p>
<p>OPPORTUNITIES</p>	<ul style="list-style-type: none"> • Galway-Clifden Greenway, including industry and community activation in advance of, during and post construction. • Development and management of Lough Corrib as a recreational resource. • Developing Joyce Country Western Lakes Geopark (see also Zone 6). • Wider integration of tourism into current and future public realm, regeneration and transport plans for Uachtar Árd Headford, Maigh Cuilinn and Clonbur/An Fhairche. • Enhancement of visitor experience at Ross Errilly. • Ongoing collaboration with Údarás na Gaeltachta, and Mayo and Roscommon County Councils.



<p>ZONE 5: SOUTH CONAMARA GAELTACHT</p>	<p>Zone 5 encompasses the south Gaeltacht area of Conamara, Ceantar na nOileán and Oileáin Árann, including Carna, an Spidéal and an Cheathrú Rua. Although Conamara generally is considered a 'Progressing Destination', there are areas within it that are less developed while Oileáin Árann could be considered an 'Enhancing Destination'.</p>
<p>STRENGTHS AND CHALLENGES</p>	<p>An Spidéal can act as an anchor town for Zone 5 due to its existing role as an entry point to traditional language and culture, as well as its strength in the arts.</p> <p>The Zone has particular strengths in Gaeltacht and island culture, coastal scenery and marine recreation, and other outdoor recreation. It requires particular emphasis on sustainability measures to protect and enhance its culture, while also developing core amenities, services and experiences to attract more visitors to less visited areas within the Zone.</p> <p>An additional attractor in Ceantar na nOileán area, and support for micro and mobile businesses, would be beneficial.</p> <p>Ongoing collaboration with the Conamara and the Islands Tourism Network and implementation of the Connemara and Aran Islands Visitor Experience Development Plan will continue to be of core concern, while working to integrate the wider area of the Zone. Continued work with the Islands Committee/Sub-Committee will enhance the islands' presentation as a unified voice.</p>
<p>OPPORTUNITIES</p>	<ul style="list-style-type: none"> • Ongoing implementation of the Connemara and Aran Islands Visitor Experience Development Plan. • Collaborative approach to tourism development of an Spidéal • Waterbased recreation using pier infrastructure. • Beaches: Blue Flag Beaches at Indreabhán, an Cheathrú Rua, and Inis Mór; Inis Oírr has a Blue Flag and a Green Coast Beach. • Ongoing collaboration with Údarás na Gaeltachta. • Wider integration of tourism into current and future public realm, regeneration and transport plans for Carna, an Spidéal and an Cheathrú Rua. • Maritime / Hooker concept as gateway theme for Ceantar na nOileáin. • Enhanced visitor experience on the off-shore islands.



<p>ZONE 6: WEST CONAMARA</p>	<p>Zone 6 encompasses the area of west Conamara, stretching west of Maam Cross and from Roundstone to Leenane, and including Clifden and Inisbofin. Although Conamara generally is considered a 'Progressing Destination', Clifden could be considered an 'Enhancing Destination'.</p>
<p>STRENGTHS AND CHALLENGES</p>	<p>Zone 6 is home to many of the features that tourists associate with Conamara, including the Tourism Destination Town of Clifden, the Twelve Bens, scenic coastline, and the two most popular visitor attractions of Kylemore Abbey and Conamara National Park. Clifden provides the anchor for the Zone, but Roundstone and Leenane are also recognised as smaller hubs.</p> <p>Key challenges for this Zone are attention to the management and dispersal of visitors at peak season, enhancement of the visitor experience, and the development of shoulder and off-season tourism.</p> <p>The ongoing development of Clifden as County Galway's Tourism Development Town is essential. Support for, and development of, the proposed Joyce Country Western Lakes Geopark will also benefit this focus (see also Zone 4)</p> <p>Ongoing collaboration with the Conamara and the Islands Tourism Network and implementation of the Conamara and the Islands Visitor Experience Development Plan will continue to be of core concern, while working to integrate the wider area of the Zone. Continued work with the Islands Committee/Sub-Committee will enhance the islands' presentation as a unified voice.</p>
<p>OPPORTUNITIES</p>	<ul style="list-style-type: none"> • Ongoing implementation of the Connemara and Aran Islands Visitor Experience Development Plan. • Ongoing collaboration with Mayo County Council. • Plans associated with the Regeneration and Destination Town projects in Clifden. • Beaches: There are four Green Coast Beaches in the Zone. • Enhanced visitor experience on the off-shore islands.



6 Marketing Strategy

6.1 Market Positioning

Gaillimh | Galway: A New Destination Brand:

Galway City Council and Galway County Councils, in partnership with Fáilte Ireland, are developing a joint tourism destination brand to represent Galway as a unified destination for the first time.

This unique opportunity creates a new identity to promote the destination and help deliver the strategic priorities set out in the Tourism Strategies of Galway City & County Councils.

In 2022 extensive research was conducted and included industry consultation to understand the key elements for the brand to convey. The outputs of this consultation resulted in key themes being identified for the destination brand, which include festivals and events, water (waterways, coasts, lakelands), Conamara and The Islands, food, Gaeilge, heritage and Galway City.

The visual identity created is a contemporary brand using a bespoke Galway heritage font, Tuam Unical. The brand's colour and suite of associated icons have been specially selected to reflect Galway and are drawn from several sources and geographical locations. Together they work in harmony to create a wide palette that evokes everything from nature to local monuments.

The new Galway tourism brand will express the destination's key positioning and assets through new brand assets including a new destination website, a new media bank of high-quality photography and video to represent the whole county, social media channels and signage. An initial marketing campaign, 'Galway, Always' will activate the brand in key domestic and international markets.

6.2 Components of a Strategic Approach to Marketing County Galway Tourism

The overarching goals of the marketing strategy for County Galway tourism are to raise awareness of the destination - including awareness of the diversity of experiences to be had within the County - and to encourage consumers to visit in order to build a sustainable tourism base.

Ten key elements of the recommended strategic approach are outlined below.

1. Support the marketing activities of the industry in the first instance as owners of the saleable product.
2. Maximise online channels (own, social media and third party) to reach all consumers.
3. Use networking and direct communication in order to build relationships in niche market segments.
4. Frame marketing messages more as invitations to shared experiences rather than a 'push' to buy.
5. Optimise word of mouth promotion by destination fans and community groups.
6. Ensure publicity and PR are used tactically throughout the year.
7. Minimise expenditure on print pieces and national/international tourism fairs unless there is evidence that they are worth the investment.
8. Participate in cooperative Tourism Ireland / Fáilte Ireland marketing initiatives.
9. Continually monitor the impact of marketing activities and adjust future plans accordingly.
10. Seek to develop collaborative marketing opportunities with neighbouring counties where appropriate, especially Galway City.





6.3 Summary Outline of Marketing Action Plan

Appendix A8.2 contains an outline Marketing Action Plan which is based on the characteristics of the target segments (identified previously) and the strategic elements identified above.

The Marketing Plan addresses a broad range of activities and Table 13 provides a summary outline of these. Across all activities there will be a focus on activity being either supported, or led, by the industry as the direct owners of saleable tourism experiences and product.

TABLE 13: SUMMARY OF MARKETING ACTIONS

Action Area	Segments
1. Brand Development	All: Independent touring visitors; outdoor actives; domestic families; domestic adult urban breaks; coach tours; daytrippers; meetings, incentives and events; visitors with disabilities and limited mobility.
2. Collaterals Print/Digital	All
3. Digital Marketing	All
4. PR and Communications	All
5. Promotions	Emphasis on supporting industry as owners of 'product' in direct sales
6. Direct Marketing	Support for industry initiatives to group organisers in niche markets, incl. incentive and events, activity clubs, disability associations
7. Advertising: Print & Digital	Off season breaks; domestic families; walking; cycling; angling and other niche markets.





Strategy Implementation

7.1 Implementation

Creating a fertile environment for growth goes far beyond the tourism sector. The successful implementation of this Tourism Strategy will depend on the organisational framework for delivery, effective partnerships among the principal interests, and the resources made available. Stakeholder inter-dependency is an important part of delivering a Tourism Strategy at the destination level and while there are actions that can be undertaken by the local authority, many actions can only be undertaken by other stakeholders, as well as the business and community sectors. Galway County Council cannot, in isolation, deliver a successful Tourism Strategy but it can play an essential role in initiating, co-ordinating and linking the various interests and stakeholders.

With partnership and collaboration around an agreed set of actions and goals, as laid out in the Action Plan, preferential conditions are created to support sustainable growth. Direct sales are actively undertaken by the tourism industry, who are best placed to sell themselves and each other.

7.2 Strategic Partnerships and Resources

Successful development requires initiative and leadership. Galway County Council developed this Tourism Strategy in order to provide a framework for growth for tourism and the tourism industry in Galway over the coming eight years. The Council has a vital contribution to make in enabling this development, most notably in relation to infrastructural development, public realm enhancement in towns and villages, environmental and landscape protection, setting the direction/vision and coordination. Its internal teams working in the areas of Regeneration, Arts, Heritage, Outdoor Recreation and the Municipal Districts all have critical roles to play in implementation.

However, many of the projects in the detailed Action Plan will have to be implemented by other stakeholders - most notably the tourism trade itself, and also through partnerships between stakeholders and with the support of funding agencies. As in other counties, there are many different bodies with a role in tourism in Galway. These include:

- Fáilte Ireland
- Galway City Council and neighbouring Councils
- Údarás na Gaeltachta
- Coillte
- Waterways Ireland
- National Parks and Wildlife
- Office of Public Works
- Galway Chamber of Commerce
- Hospitality, food and craft businesses
- The arts sector
- Galway Roscommon Education and Training Board
- Atlantic Technological University
- University of Galway
- Existing tourism networks, e.g. Destination Lough Derg, Conamara and the Islands Tourism Network, the Galway Convention Bureau

In addition, there are many projects currently ongoing with the partners above that provide a basis for further collaboration, including cross-Council projects such as the joint destination brand for Galway, Visitor Experience Development Plans, Greenways, Blueways, other trails, and the proposed Joyce Country Western Lakes Geopark.

At the time of writing, the principal sources of funding, other than private sector investment, currently available for tourism projects are as follows, and the Strategy provides an opportunity for a coherent approach to these.

- Council Funding
- Rural Recreation Development Fund
- Rural Infrastructure Development Fund
- Urban and Rural Regeneration and Development Funds (URDF/RRDF)
- Town & Village Renewal
- The Outdoor Recreation Infrastructure Scheme
- Creative Ireland Funding
- Local Live Performance Scheme
- Just Transition Fund
- Leader
- ERDF
- Bord Iascaigh Mhara FLAG programme
- Fáilte Ireland Capital and other funding, as available, e.g. Tourism Destination Towns, Re-imagining Urban Spaces, Platforms for Growth - a Programme for Tourism Investment 2019-2022
- Night Time Economy Support Scheme

7.3 Measurement

In addition to measurement of volume and value, a sustainable tourism destination should also have metrics/measurements around the following.

- Visitors, e.g. satisfaction levels, as gauged through qualitative feedback through online fora and platforms such as TripAdvisor and Google
- Community, e.g. sustainability, engagement, satisfaction with tourism
- Industry, e.g. viability, engagement
- Environment. This is an area that is currently monitored through a variety of mechanisms both at a County level and nationally (see also separate Strategic Environmental Assessment / Appropriate Assessment Reports). This Strategy provides for a framework under which tourism actions can link directly to those mechanisms, ensuring that development and marketing protects and enhances County Galway's environment and does not place further strain on waste management, water quality and biodiversity where issues have been identified. As the Galway County Development Plan remains the primary land use and planning framework for new development activities, many of the sustainability and environmental objectives would be achieved through the implementation of the existing environmental and tourism protective measures in the CDP and LECP.

Given the weakness already identified in official national statistics, it is proposed that the possibility of establishing additional industry and visitor surveys be explored. These could include the following.

Accommodation occupancy survey: This could be set up as a confidential online portal where room and bed capacity and occupancy can be easily entered by businesses. Additional metrics relating to main market origin and party composition of visitors could also be captured. However, the survey would be kept simple and very brief in order to encourage participation.

Visitor attraction survey: This would be similar to the above for the visitor attraction sector.

Visitor survey: In order to capture first-hand feedback from visitors in the County, a peak season survey at key sites with sufficient footfall would provide valuable information relating to satisfaction levels, holiday behaviours and interests.

It might be possible for the surveys above to be developed and implemented in conjunction with third level institutions. An annual survey of the industry would also help identify any issues and opportunities, and help focus the following year's activities.

In addition, Galway County Council Tourism will monitor and identify relevant regional studies, such as the Sustainable Destination Management for Island Tourism study being carried out on the islands by ATU.

Forward-looking activity will be routinely accompanied by performance review and assessment of outcomes that are based on identified key performance indicators. This internal measurement is a matter for internal management within Galway County Council and will be built into its own monitoring and measurement systems.

7.4 Critical Success Factors

Embarking on the process of tourism development presents an opportunity for County Galway to focus on its strengths and to position itself in a visible and attractive way in the marketplace. The County has significant opportunities and by directing energy and resources towards some key priorities, as outlined in the Strategy, the County can reap the rewards that sustainable tourism has to offer what is a primarily rural destination.

As noted already, a wide variety of stakeholders are involved in delivering a memorable and high-quality tourism experience. As a result, effective management of the implementation of the Tourism Strategy, including co-ordination of the principal stakeholders, is a most important critical success factor. The active participation of the funding partners identified is also crucial.

A further factor that is critical to the success of the Strategy is the adequate resourcing of it through staffing and budget. These facilitate the leveraging of opportunities that exist in strategic partnerships - for example with Fáilte Ireland, Údarás na Gaeltachta, Waterways Ireland, Coillte, Bord na Móna, National Parks and Wildlife Service and Office of Public Works - as well as the opportunities presented by various funding programmes. In this context, a longer term ambition would be to review the governance structure for tourism within the County in order to further strengthen its resourcing.

Another factor critical to success is the wholehearted adoption of sustainability as a modus operandi for the destination - including measures for destination management, for industry and for visitors. This can be progressed in the first instance through the establishment of a dedicated working group to identify the best approach to embedding sustainability standards and practices.

Finally, without industry and community participation in maximising the opportunities represented in this Strategy, the County will not grow and develop as a successful and sustainable tourism destination. The delivery of tourism is a collaborative effort that requires engagement at all levels and across all areas.



APPENDICES





A8.1 Action Plan

Glossary

ATU	Atlantic Technological University
CAITN	Conamara and the Islands Tourism Network
CCC	Clare County Council
CDP	County Development Plan
CGCA	Cósta Gaelach Conamara Árann
DEDP	Destination and Experience Development Plan
DLD	Destination Lough Derg
FI	Fáilte Ireland
GCC	Galway County Council
G City	Galway City Council
IHH	Ireland's Hidden Heartlands
JCWL	Joyce Country Western Lakes Geopark
LEO	Local Enterprise Office
MCC	Mayo County Council
NPWS	National Parks and Wildlife Service
OCC	Offaly County Council
OPW	Office of Public Works
ORIS	Outdoor Recreation Infrastructure Scheme
RCC	Roscommon County Council
RV	Recreational Vehicle
TCC	Tipperary County Council
ÚG	Údarás na Gaeltachta
WAW	Wild Atlantic Way
WI	Waterways Ireland
VEDP	Visitor Experience Development Plan

Strategic Theme 1: Destination Management

High Level Goal 1: To enhance the sustainable development of tourism across County Galway, maximising the opportunities presented by increased co-ordination and facilitating nuanced delivery of interventions according to local characteristics.

Objective 1: Enhanced co-ordination and management, including support for collaboration with tourism industry

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
1.1 Establish working group with strategic partners that will oversee collaborative work across the County, including the Tourism Strategy	There is a need for a high level working group that draws together senior partners from both within GCC as well as external strategic partners.	GCC; FI; WI; ÚG; Coillte; NPWS; OPW; LEO	Establish in the short term and meet at least twice annually throughout the lifetime of the Strategy.	Ability to track actions of Tourism Strategy and to adapt to changing circumstances and global challenges. Alignment of work programmes at strategic level.	Establishment of Working Group and agreed scope. Min. two meetings per annum.
1.2 Collaborate with neighbouring local authorities (see also above)	Ongoing implementation of the existing VEDPs and Masterplans, as well as co-ordination of ongoing projects such as trail development/management,. (See also recommendations relating to specific areas below, e.g. Oileáin Árann and Lough Corrib).	GCC; G City; MCC; CCC; RCC; TCC; OCC	Initial communication within one month of adoption of Strategy. Ongoing thereafter.	Alignment of work programmes across county borders. Efficient use of resources.	Communication with Tourism Officers on specific shared objectives. Agreed agenda of shared regional actions. Annual KPIs to be agreed.
1.3 Resource the function / Ensure adequate resources available to deliver strategy	A dedicated tourism team is required to lead out and co-ordinate the implementation of the Tourism Strategy and to work with all partners to deliver (internal and external).	GCC	Medium term	Increased resources from baseline of 2022. Efficient and timely delivery of action plans.	Appointment of a permanent Tourism Officer and dedicated supporting staff. Increased revenue budget. Delivery of Tourism Strategy KPIs.

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
1.4 Continue to deliver the Galway to Athlone Cycleway project and Connemara Greenway, and existing VEDPs, Masterplans and development plans with existing tourism networks/ teams, integrating wider zones as opportunity presents.	The momentum underway on the Greenways and with existing networks and teams, e.g. existing VEDPs and Masterplans, CAITN, Town Teams and community tourism groups, should continue. As existing plans are reviewed and new Destination Plans developed, the wider zones should be integrated (see 1.5 below).	GCC; FI; all partners	Ongoing	Enhancement of infrastructure and the visitor experience across the County. Increased visitor numbers across the County, particularly in less-visited areas.	Delivery of KPIs identified within existing plans. Additional more local-level KPIs to be developed.
1.5 Review existing tourism projects and plans (1.4 above) in order to identify actions/locations not currently integrated (see separate Zone actions below).	There are areas within the County that currently do not benefit from an integrated VEDP and although a new Destination Plan is proposed for 2023 that will include east Galway, there will still be areas that are not covered. A comprehensive review of these areas is needed and a longterm ambition to integrate them into existing and/or new wider initiatives.	GCC; FI; existing networks/ teams; - CAITN, DLD, Galway Convention Bureau , JCWL Geopark, Burren VEDP steering group	Short - medium term	Enhanced integration of tourism development and promotion. Efficient use of resources.	Actions and locations identified for integration.
1.6 Support community groups with measures that highlight opportunities for tourism development including heritage and biodiversity	Community groups will continue to be supported, where there is evidence that the projects are sustainably based and can be integrated into a wider geography/ initiative that can support them.	Local community groups; GCC	Ongoing	Enhanced visitor experience at a local level.	KPIs to be identified per project.

Objective 2: Embed sustainability within the tourism offering in County Galway by working with Fáilte Ireland and the industry

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
2.1 Support environmental sustainability in the development and implementation of all actions.	All plans, programmes and projects associated with the strategy should adhere to all statutory requirements.	GCC; all partners, including industry and communities	Ongoing	Protection, appreciation and enhancement of the environment	Environmental metrics as built into CDP and other statutory mechanisms
2.2 Work with Fáilte Ireland to support embedding sustainability standards and practices in tourism	Against the backdrop of the UN Sustainable Development Goals, Government's commitments under the Paris Agreement, and the national Climate Action Plan 2021, there is a need to ensure that tourism development becomes increasingly sustainable. A range of initiatives have been identified in Fáilte Ireland's Regional Tourism Development Strategies and GCC will support and align with those.	FI; GCC; Tourism Industry	Medium to long term	The embedding of sustainability standards and practices across the tourism industry	KPIs to be agreed following development by FI of approach
2.3 Work with Fáilte Ireland to roll out sustainability programme	The programme will require associated training and communications.	FI; GCC; Tourism Industry	Medium to long term	The embedding of sustainability standards and practices across the tourism industry	KPIs to be agreed following development by FI of approach.
2.4 Establish/review seasonal traffic counts for main routes through Connemara and the Galway Burren	There is a need to substantiate subjective evidence that management of coach tours is required during peak season in popular locations.	GCC	Medium term	Improved seasonal traffic management	Review complete. Actions agreed.
2.5 Work with partners to establish EV charging locations that will support visitors exploring across the County by electric vehicles and develop EV Strategy	There is a growing need for electric charging for a variety of vehicles used by visitors, including cars, RVs and bikes. Align Galway County EV Strategy with those identified/to be identified by FI, WI and other key stakeholders.	GCC; FI; WI; Coillte; NPWS; OPW	Medium to long term	Established network of EV charging locations across the County	Initial discussions held. Approach and plan agreed. Development of sites.

Objective 3: Ensure that there is an effective monitoring and measurement system in place to track the implementation of the Strategy

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
3.1 Develop 2 yearly actions plans aligned with Local Economic and Community Plan process/ timelines	Develop systems and KPIs for GCC plans Use existing networks (VEDPs)	GCC	Ongoing	Detailed 2 year action plans, reviewed annually	2 year plans agreed. Annual reviews completed.
3.2 Interim review of Strategy	Given the longterm nature of the Strategy, regular annual review of actions and outcomes is required. This should be supplemented by a more rigorous interim review that also takes account of any significant change of the wider market environment.	GCC	Mid-term review	Assessment of actions and reviewed where appropriate	Review complete. Revised action plan developed.
3.3 Complete the European Tourism Indicator System (ETIS) with ATU	The ETIS model is agreed at European level and is widely used in the EU to measure the sustainability of tourism in various destinations. The model is currently being used by the ATU on the Galway islands, the output of which will inform future planning considerations for GCC and other stakeholders. There is the potential to expand the model to the entire county and support its use on an annual basis to facilitate long-term longitudinal analysis and planning.- see also 3.4.	ATU; GCC	Short term then ongoing if implemented more widely	Enhanced understanding of tourism patterns on the off-shore islands	ETIS complete. Agreement on further roll-out, if appropriate. Additional KPIs to be agreed.
3.4 Establish new mechanisms for monitoring and measurement	Work with Fáilte Ireland and third level institutions to establish an agreed model for annual measurement and monitoring of tourism activity and sustainability. Key areas of focus will be accommodation capacity and occupancy, visitor impressions and satisfaction, environmental impact, carbon footprint measurement, community impact, and enterprise survey. (See also 3.3).	GCC; FI; third level institution; industry	Medium term	Enhanced understanding of County-level tourism trends	Discussions taken place. Approach agreed and measurement tools in place. Response rates.

Objective 4: Improve the visitor experience through ongoing projects that involve orientation and connectivity

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
4.1 Work with Fáilte Ireland to review transport between key zone towns and surrounding villages and attractors, as well as with and between islands. Introduce pilot 'park and ride' options during peak season in the most popular areas.	Collaborating with Fáilte Ireland and Active Travel initiatives to ensure tourism is fully integrated into transport, traffic management and walking/cycling sub-strategies for key towns and villages (ref. CDP, Appendix 3). Include additional towns/villages if required, and also consider transport to and between the islands. Pilot initiatives in peak season.. Ensure these are integrated with Regional Tourism Development Strategy objectives with regard to local transport.	GCC; FI; industry	Ongoing	Reduced use of car transport by tourists and enhanced connectivity of towns, villages, islands and key locations	Review complete. Initiatives identified. Additional KPIs to be identified for specific initiatives.
4.2 Work with Fáilte Ireland to rationalise approach to tourism signage and touring routes across the County, with particular focus on zone towns	With the involvement in tourism and recreation of multiple agencies and community groups, there is a wide variety of signage types and brands in existence, particularly in the more tourism-focused areas of the County. There is a need to rationalise these in order to present coherent messages. GCC will work in a collaborative manner with other agencies to facilitate and to help promote signage on a project by project basis.	FI; GCC; other agencies and stakeholders	Short to medium term	More visitor-friendly and unified presentation of information and signage across the County	Approach agreed. Review complete. Follow-up actions agreed. Further KPIs to be identified.

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
4.3 Review and improve connectivity of Greenways, Blueways, Beara Breifne Way and other trails with towns and villages along the routes	There has been substantial investment in greenways, blueways and a variety of trails across the County and opportunities under Fáilte Ireland's Just Transition Regenerative Tourism and Placemaking funding allocation. To maximise economic return, there is a need to ensure that local towns and villages are well-integrated, through signage, parking and physical connectivity. A review is needed to agree key towns and villages along the routes (including spurs) with strategic partners for a programme of connectivity. (Ref. also Shannon Masterplan and Lough Derg VEDP).	FI; GCC; Coillte, NPWS; WI	Short term and ongoing	Integration of trail network with towns, villages and key sites in order to enhance the visitor experience and maximise economic benefits for local communities	Review completed. Actions agreed
4.4 Continue to work on the Galway to Athlone Cycleway Project.	This important route will provide connectivity to Galway and needs to be delivered and also maximised (see 4.3 above). Opportunities for synergies on development and promotion of the infrastructure should be sought.	GCC; NRO; TII	Ongoing	Encouragement of slower and non-car tourism.	To be agreed once mapping has been complete
4.4 Support Fáilte Ireland in the delivery of a new Wild Atlantic Way Coastal Path	A new Coastal Path has been proposed in the draft Wild Atlantic Way Regional Tourism Development Strategy that would upgrade and enhance existing coastal paths and other planned initiatives.	FI; GCC; industry and local communities	Medium to long term	Encouragement of slower and non-car tourism along the coast	To be agreed in consultation with FI through development of this plan

Objective 5: Improving Universal Access for Tourists in the County

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
<p>5.1 Seek to improve universal access in tourism experiences across the county.</p>	<p>This action involves:</p> <ul style="list-style-type: none"> • Accessibility of accommodation, visitor attractions, dining, trail and water access, and outdoor experience providers. While not all water locations can be developed for universal access, there is a need to identify a number of access points to sea, river and lake across the County that can be developed. For beaches, Kinvara and Inverin provide good examples. • Establishing a scheme to improve accessibility where necessary and to ensure a listing of universally accessible tourism locations/ products/experiences is available online. • Universal Design Guidelines to be used in Regeneration and MD programmes. 	<p>FI; GCC; industry; local communities</p>	<p>Medium term</p>	<p>Increased access for visitors of differing abilities</p>	<p>Review completed. Actions agreed</p> <p>Specific metrics to be established relating to the amount of fully-accessible amenities available.</p>

Objective 6: Enhance Visitor Welcome

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
6.1 Work with Fáilte Ireland to review visitor experience and quality of offering in all key towns.	<p>Town Centre First is a key objective. The visitor welcome in towns and villages needs to be reviewed, with reference to the Tourism Destination Towns toolkit. This should include:</p> <ul style="list-style-type: none"> a collaborative approach to regeneration projects, with the visitor welcome as a key pillar of economic development; integration into ongoing projects, e.g. in Ballinasloe, Tuam; signage, wayfinding and orientation; linking trails to town centres, recreation and sites of historical interest; opportunities for flexible accommodation within rural towns, e.g. glamping, diffused accommodation model; RV facilities near town centres; town centre enhancement schemes; supporting creative places / creativity in towns. 	GCC; FI; existing networks/ teams	Short to medium term	Enhanced presentation of, and experience in, towns and villages	<p>Review complete. Actions agreed. Specific KPIs to be agreed based on actions identified.</p>
6.2 Review availability of public toilets, parking, showers and water fountains in key locations and develop plan to address gaps	Ensure availability of adequate public services, which is an essential part of the visitor welcome.	GCC	Short to medium term	Provision of essential services in key locations	<p>Review completed. Actions agreed for specified locations.</p>

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
<p>6.3 Explore the potential of upgrading the visitor experience at key locations including promotion and retail of local produce</p>	<p>Many of the recreation and leisure sites in the county would benefit from a next stage investment for outdoor power supply, environmentally sensitive lighting schemes and space for pop-up hospitality providers to elevate these landscape experiences from amenity to leisure destination. Existing Bye-Laws may create obstacles in this regard and alternative solutions should be considered where possible, e.g. working with landowners to make suitable spaces available.</p>	<p>GCC; FI; Coillte; NPWS; existing networks/ teams</p>	<p>Medium to long term</p>	<p>Increased visitor numbers, longer dwell time and small business opportunities at key locations</p>	<p>Suitable sites identified. Interventions agreed and underway.</p>

**Objective 7: Maximise the opportunities and address the needs of ZONE 1
(South East Galway, in Ireland's Hidden Heartlands)**

Note: Additional actions relating to the Zones are embedded in Objectives 1-6

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
7.1 Support local delivery of objectives in Shannon Tourism Masterplan and Lough Derg VEDP	<p>This action includes continuing to resource and work in Destination Lough Derg partnership, progressing collaborative actions with stakeholders in Portumna, and delivery of other actions relating to this area of the Shannon.</p> <p>It also includes collaboration with OCC and WI in connection with the development of Banagher as a hub and of trails in the wider area, including to Meelick Weir.</p> <p>See also 1.5.</p>	WI; FI; GCC; /TCC; CCC; OCC; RCC Destination Lough Derg; Coillte; local industry	Ongoing	Enhanced visitor experience along the Shannon and at Lough Derg	<p>Establishment of town team in Portumna.</p> <p>Other KPIs as per STM and VEDP.</p> <p>Midterm review undertaken.</p>
7.2 Continue to implement Portumna projects under the strategic partnership	<p>With an emphasis on Portumna as a hub to a wider area beyond Lough Derg and the Shannon, there is a need to review its integration with existing and developing trails, towns, villages and the countryside to the north and west especially.</p> <p>Meetings with Portumna partnership ongoing.</p>	GCC; FI; WI; OPW;Coillte; DLD Portumna Chamber; IFI	Ongoing	Enhanced visitor experience in Portumna and hinterland	<p>Coordinated delivery of agreed projects with DLD.</p> <p>Increased visitor numbers.</p>

**Objective 8: Addressing specific needs and opportunities in Zone 2
(South West Galway, in the Wild Atlantic Way)**

Note: Additional actions relating to the Zones are embedded in Objectives 1-6

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
8.1 Maximise the opportunities for coordination with Burren VEDP and future development plans for the region	To date, the Burren has been most closely associated with Clare but there is an opportunity to build on existing momentum in Gort and at Coole Park to more fully develop Zone 2 as a threshold area that connects the Clare Burren with County Galway, catering to visitors travelling northwards and southwards along the WAW.	GCC; FI; NPWS; industry	Ongoing	Increased collaboration across the wider Burren area, with greater awareness of the Burren areas within County Galway.	See 1.5
8.2 Support partner agencies in developing a strategic approach to sites in the Zone and include communities of interest/local heritage groups	There are specific sites within Zone 2 that lend themselves to strategic enhancement and linking with specific towns. Compelling themes for this destination include heritage, ecclesiastical, castles, biodiversity, Burren/geology. These should be linked with 8.1 as the VEDP/DEDP approach allows for more unified approach to local tourism development.	OPW; GCC; CCC, FI	Medium to long term	Enhanced presentation of heritage and promotion of themed visitor experiences in the area. Increased visitor numbers.	KPIs to be agreed following discussions with key stakeholders
8.3 Support NPWS in developing sustainable visitor services and facilities of Coole Park.	The NPWS, with Fáilte Ireland, have developed a Tourism Interpretative Masterplan for their National Parks and Coole Park, which outline the interpretative framework for these sites. This document supports enhanced visitor experiences at Coole Park, which aims to develop the site as a world class tourist destination.	NPWS; GCC; FI	Ongoing	Enhanced visitor experience at Coole Park	KPIs according to Masterplan

**Objective 9: Addressing specific needs and opportunities in Zone 3
(North East Galway, in Ireland's Hidden Heartlands)**

Note: Additional actions relating to the Zones are embedded in Objectives 1-6

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
9.1 Support the development and implementation of the proposed East Galway DEDP	A new DEDP is proposed in the draft IHH Tourism Development Strategy for the area that encompasses the north east of the County.	FI; GCC; industry and local communities	Medium to long term	Enhanced visitor experience in the area.	Establishment of DEDP. Agreed action plan.
9.2 Support the delivery of the Beara Breifne Way Masterplan through enhancement of the Suck Valley Way, expanding tourism supports and eco experiences, and exploring connectivity to existing and other potential trails, e.g. on BNM land	Work with existing groups and private operators to develop pilots that maximise new trail development and Just Transition funding opportunities. Consider commercial hides, luggage transport and accommodation services, glamping. Also explore opportunities to enhance the experience by developing/connecting with additional tracks and trails.	FI; GCC; RCC; industry; Bord na Móna	Ongoing	Enhanced visitor experience along this stretch of the Beara Breifne Way	Increased visitors along the Suck Valley Way. KPIs to be agreed for specific initiatives as they are agreed.
9.3 Review opportunity for the development of a Clare River Valley Way	Consider the tourism potential for visitors and support local community in delivering relevant actions that could enhance the appeal of an area that is currently weak in terms of tourism infrastructure.	Local community; GCC	Medium to long term	Establish whether there is potential for a Clare River Valley Way	Review completed and outcomes agreed

**Objective 10: Addressing specific needs and opportunities in Zone 4
(East Conamara and Lough Corrib, in the Wild Atlantic Way)**

Note: Additional actions relating to the Zones are embedded in Objectives 1-6

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
10.1 Finalise feasibility for Great Western Blueway / Corrib-Mask Study and explore opportunity for a wider Recreational Plan for Lough Corrib.	The lake is a substantial asset not only in terms of touring and heritage but also for recreational boating, wild swimming and angling. It will benefit from a co-ordinated approach, similar to Lough Derg, that would provide for its development and management.	GCC; G City; MCC; IFI; OPW; Corrib Navigation	Medium term	Enhancement management and development of Lough Corrib with greater opportunity for visitor access to, and utilisation of, the water and its shores.	Review Blueway feasibility on completion for opportunity to expand to recreational plan. Discuss with key partners. Agree outcome.
10.2 Explore opportunity for Ross Errilly Conservation Management Plan	Discuss opportunity with OPW to develop Plan for this significant monastic site and to integrate it more fully with Headford and the surrounding area	OPW; GCC; local communities	Medium to long term	Enhanced appreciation and presentation of Ross Errilly, capable of attracting larger visitor numbers.	KPIs to be identified when approach is agreed.
10.3 Support NPWS in developing sustainable visitor services and facilities at Connemara National Park	The NPWS, with Fáilte Ireland, have developed a Tourism Interpretative Masterplan for their National Parks, which outline the interpretative framework for these sites. This document supports enhanced visitor experiences at Connemara National Park, including new trails, a new alternative car park, and a new visitor centre.	NPWS; GCC; FI	Ongoing	Enhanced visitor experience at Connemara National Park	KPIs according to Masterplan
10.4 Support NPWS in developing sustainable visitor services and facilities at Knockma Wood.	The NPWS is working with the local community and the Council regarding the development of visitor facilities and an enhanced trail network at Knockma Wood. They are also looking at the feasibility of walking and cycling links to Belclare, Tuam and the wider area. These potential developments could enhance the appeal of an area that is currently weak in terms of tourism infrastructure.	NPWS; GCC; local communities	Ongoing	Upgraded visitor experience at Knockma Wood and improved connectivity with the wider area.	KPIs to be agreed in conjunction with NPWS

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
10.5 Support development of minor destinations and supporting experiences within the JCWL Geopark.	Support the JCWL Geopark in its application and the development of micro destinations that will provide a focus for activity and economic opportunities. Experiences within the Geopark area that could attract visitors, encourage length of stay and provide opportunities for local revenue generation include Gaelige, Dark Skies, angling and other outdoor recreation and natural heritage initiatives.	JCWL Geopark; GCC; MCC; ÚG	Ongoing	Achievement of UNESCO Geopark designation. Delivery of suitable visitor experiences in the area.	Application successfully submitted. Training and development needs identified (see Strategic Theme 4)

**Objective 11: Addressing specific needs and opportunities shared by Zones 4, 5 & 6
(All of Conamara, in the Wild Atlantic Way)**

Note: Additional actions relating to the Zones are embedded in Objectives 1-6

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
11.1 Support the implementation of the Conamara and the Islands VEDP	There is considerable momentum underway on this VEDP and this should continue by ongoing delivery actions of the The Connemara Coast and Aran Islands VEDP and the carrying out of a collective review to establish next steps once it expires in 2023. (see 1.5).	FI; GCC; industry	As per VEDLP, 2018-2023	Enhanced visitor experience in the area and improved collaboration of industry and stakeholders	KPIs according to VEDP
11.2 Support relevant actions in local tourism plans	Both CGCA and JCWL Geopark have developed independently commissioned tourism plans with steering groups. Key stakeholders from both groups are networked with the Tourism office in Galway County Council. The Tourism office will keep in regular contact and support actions where there are cross cutting objectives around tourism promotion, networking and development, including representation at networking events. See also 1.5.	GCC; CAITN; JCWL; CGCA; other partners	Ongoing	Integration of all plans under overarching Strategy, VEDPs/DEDPs and Masterplans	KPIs as identified in relevant plans
11.3 Develop Clifden as a key tourism hub for Conamara by continuing to deliver on the Destination Towns and regeneration programmes.	Clifden has been awarded significant funding through Fáilte Ireland's Tourism Destination Town scheme and there is also a regeneration programme ongoing in the town, both of which will contribute to the establishment of an attractive destination town and cycling hub for Conamara. There is a need to deliver signage, wayfinding and interpretation, as well as support for the development of an Irish Language Plan for Clifden by Forum Connemara.	GCC; FI; Forum Connemara	Ongoing	Excellent and sustainable visitor experience in Clifden with associated benefits for the local community and industry	Delivery of all agreed actions as per other plans and initiatives.

**Objective 12: Addressing specific needs and opportunities shared by Zones 5 & 6
(South & West Conamara, in the Wild Atlantic Way)**

Note: Additional actions relating to the Zones are embedded in Objectives 1-6

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
12.1 Support development of an Islands Visitor Management Plan	The four inhabited off-shore islands (Oileáin Árann and Inisbofin) are small geographic areas with very specific and unique environmental and social/cultural sensitivities. At peak times, they are coming under strain which a co-ordinated management plan would help to address and also prevent further deterioration. During the off-season, there are opportunities to attract visitors through traditional events and other programmes, e.g. music, Gaeilge, skills development and training. The Plan will need to integrate ongoing work between OPW and Fáilte Ireland with regard to sites on Inis Mór.	FI; GCC; OPW, ATU; NPWS. ÚG; CAITN islands sub-committee; tourism networks; local communities	Short to medium term	Improved visitor management on the islands. Enhanced environmental, community and economic sustainability	Plan commissioned. Plan completed. Action plan agreed.

**Objective 13: Addressing specific needs and opportunities in Zone 5
(South Conamara, in the Wild Atlantic Way)**

Note: Additional actions relating to the Zones are embedded in Objectives 1-6

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
13.1 Support Údarás in reviewing opportunity for new attractor in Ceantar na nOileán and support additional marketing	In order to create a greater cluster effect, an additional attractor is required that would encourage visitors to detour from the dominant touring routes. The attractor does not necessarily have to be a visitor attraction - a well serviced beach, high quality food offer or similar would also work. There is also a need for enhanced marketing.	ÚG; GCC; FI	Short to medium term	Additional tourism in Ceantar na nOileán	Discussions taken place with ÚG. Attractor identified. Development plan underway

Strategic Theme 2: Experience Development

High Level Goal 2: To sustainably maximise the benefits of tourism to County Galway by ensuring visitors have a wide range of high-quality things to do and see.

Objective 14: Animating the destination

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
14.1 Develop an integrated festivals and events policy.	<p>The policy should include the following.</p> <ul style="list-style-type: none"> • A year round programme of events that initially develops existing events with tourism potential, e.g. Connemara Walking Festival, Medieval Loughrea, Athenry Walled Town Day, Féile na gCloch, Cruinniú na mBád. Events should be varied and include traditional and contemporary arts and culture, music, sports, water-based activities, community and food. <p>There are a number of boating festivals along the Conamara coast that can be pitched as visitor experiences along with waterside hubs, and there is scope for collaborative events with the Heritage Boats Association and Waterways Ireland.</p> <ul style="list-style-type: none"> • Explore the potential of sports tourism and outdoor events to build on existing/previous mass participation events. • Use of larger towns as accommodation and transport hubs for smaller locations. • A festival and events grant scheme. • A published rolling online calendar of events to provide information to the public and visitors. 	GCC; FI	Short term for development of initial strategy and then ongoing	<p>Enhanced activity across season.</p> <p>Celebration of local events.</p> <p>Unique experiences for visitors.</p>	<p>Policy complete.</p> <p>Action Plan agreed.</p> <p>Rolling calendar available online and updated regularly.</p>

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
14.2 Animation programme.	Introduce peak season animation programme in primary towns and key visitor sites within Zones 2, 4, 5 & 6, working with the County Arts Office, local arts centres, theatre groups, traditional music groups and community arts practitioners. This can be a combination of existing programmes, adapted for new audiences/locations and new events. Consider 'meanwhile use' of vacant and underused sites/buildings that may require only minimal (e.g. technical) interventions to make them suitable as temporary venues. Ensure family-friendly animation is included. Expand to other towns once established.	GCC; Arts Centres & theatre groups; Comhaltas Ceoltóirí Éireann; publicans	Medium to long term	Greater daytime vibrancy across the County and enhanced evening entertainment offer.	Programme commissioned. Action plan agreed.
14.3 Collaborate on a food strategy so that there is a strong tourism focus on the development, promotion and visitor retail as well as the establishment of a food trails and agritourism	The strategy should include a programme of markets and pop-up style events, as well as actions to encourage inclusion of local produce on menus and retail. It should identify opportunities upgrading of spaces for markets and pop-ups through Town and Village enhancements. It should also include collaboration with BIA, LEO & micro-feasibilities that support food clusters / trails - connecting producers and hospitality operators to elevate the food and offering across the County. Limitations resulting from existing Bye-Laws to public markets/pop-ups can be accommodated by seeking alternative solutions, e.g. use of vacant properties, privately-owned sites. Craft should be integrated where possible.	GCC; FI; BIA; LEO	Ongoing throughout lifetime of strategy	Improved food experience for visitors and increased opportunity for producers to reach tourists.	Strategy complete. Action plan agreed

Objective 15: Providing for an evening economy

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
15.1 Work with Fáilte Ireland to encourage development of evening economy in key towns	Work with Fáilte Ireland in key towns , e.g. Tuam, Ballinasloe, Clifden, Portumna, Gort and Athenry, to take advantage of the Night Time Economy Support Scheme and other similar initiatives, with the potential to progress to Purple Flag status in the longer term. Create an agenda with local commercial leaders to identify opportunities and incentives for established hospitality operators.	FI; GCC; Chambers of Commerce	Longterm	Improved nighttime offer for visitors in key towns	Plans agreed. Other KPIs to be identified resulting from the Plans.

Objective 16: Enhancing the tourism opportunity of outdoor recreation, land and water based

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
16.1 Develop County Outdoor Recreation Strategy and establish Steering Group in line with National Outdoor Recreation Strategy	Building on the new National Outdoor Recreation Strategy, and on the Transport and Planning Study in the CPD, there is an opportunity for County Galway to develop its own Outdoor Recreation Strategy focussed on Greenways, Blueways and other trails that can support tourism. Other related actions in this Action Plan can be subsumed under such a new Strategy or progressed independently in the short term.	GCC; FI; NPWS; Coillte; WI; MCC; RCC; OCC; TCC; CCC;	Medium to long term	Enhanced recreational opportunities and experiences. Maximisation of resources and opportunities.	Establish Trails Steering Group to consolidate strategic oversight. Strategy developed. Action Plan agreed.
16.2 Work with agency partners to avail of ORIS funding as a mechanism for improving outdoor recreation product across the County that will support tourism development	Strategic projects (trails/Blueways) that will clearly strengthen the County's profile as a destination with exceptional trail experiences should be prioritised .	GCC; Agencies; GRD; Forum Connemara	Ongoing	Improved recreational product across the County	KPIs as per individual projects

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
16.3 Continue to avail of ORIS as mechanism for trail development and maintenance	Continue to facilitate, promote and support community groups in the development, maintenance and enhancement of sustainable walking routes at appropriate locations throughout the County through the Outdoor Recreation Infrastructure Scheme.	Local communities; Coillte; GCC	Ongoing	Improved recreational product across the County	KPIs as per individual projects
16.4 Support establishment of a water activities operator forum	There is a growing emphasis on the use of water for recreation and as a means of encouraging visitors to less-visited areas. A formal network or forum of operators providing water-based experiences would help inform this as well as supporting operators, the vast majority of whom are micro-businesses, in growing their markets.	WI; GCC; industry; IFI; Coillte; other state landowners with water frontage	Medium to long term	Increased collaboration among water activity operators, leading to greater visitor engagement	Forum and fund in place
16.5 Explore a beach and jetty enhancement programme that will support wild swimming, boating and water-based activities	<p>There is a need for a co-ordinated approach to ensuring key facilities and to restore and maintain standards at suitable locations, e.g. jetties close to towns/ villages on lakes, Green Coast and Blue Flag beaches, locally popular river and lake swimming points.</p> <p>A first step in this regard is to review the strategy for smaller piers being developed by GCC for opportunities to collaborate and to integrate sustainability.</p> <p>Providing for additional moorings along the coast needs to be considered and the installation of pontoons at Cill Rónáin supported.</p> <p>There is also an opportunity to improve sustainability of heritage piers, especially in the context of wider town/ village development.</p>	GCC; WI; IFI; BIM Flag Programme	<p>Short term for review of GCC pier strategy.</p> <p>Medium to long term for other elements.</p>	Greater opportunity for casual water use by visitors, encouraging slower tourism and increasing length of stay.	Review complete. Programme developed. Action plan agreed

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
16.6 Review opportunities for a coastal Blueway	Coastal tourism is a significant asset for Galway. A formalised Blueway trail would encourage greater coastal exploration and bring into play less visited area. In addition to Conamara, the review should include the Burren VEDP recommendation to establish a Blueway along the Kinvara coast - possibly using this as a pilot in conjunction with CCC.	FI; GCC; CCC; BIM (Flag)	Medium to long term	Greater opportunity for casual water use by visitors, encouraging slower tourism and increasing length of stay.	Review complete. Action plan agreed
16.7 Explore potential to develop 'welcome scheme' for walkers and cyclists along Greenways, Blueways and trails	Work with communities close to Greenways, Blueways and other significant trails to maximise the opportunity of providing supporting experiences to visitors. Towns to consider include Ballygar, Aughrim, Maigh Cuilinn, Carna, Kinvara as well as larger hubs on the Athlone-Galway cycleway, e.g. Ballinasloe. Pilot a county-wide 'Walkers and Cyclists Welcome' scheme in smaller walking/cycling hubs based on the one in Clonbur/An Fhairche.	GCC; Coillte; Sport Ireland; FI; WI	Medium to long term	Improved facilities, services and welcome for activity-focused visitors	Scheme developed. Action plan agreed
16.8 Explore feasibility of Greenway spurs Derrygimlagh to Kylemore and to Carna / south Conamara coast	The Derrygimlagh-Kylemore spur will support more sustainable forms of travel in a busy area - consultation and stakeholder engagement should be supported, as well as delivery should it be considered feasible. The south Conamara proposed spur is part of the EuroVelo route and its upgrade to full Greenway would support the opening up of this less-visited area.	GCC; ÚG	Medium to long term	Increased Greenway network encouraging wider distribution of tourism	Route/s agreed and approved. Route development commenced.

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
16.9 Support applications for Dark Sky designation where they are currently underway	The islands and more remote areas of the County (e.g. Geopark) are suited to development of Dark Skies tourism. GCC can support by ensuring light pollution is minimised and public lighting adapted to meet standards.	Community and special interest groups; GCC; University of Galway or similar	Ongoing	Protection of dark skies and development of associated tourism experiences	Applications submitted. Designation/s received. Action plans agreed.
16.10 Develop County-wide marketing plan for all trails	This plan should highlight the most effective mechanism for building awareness in order to reduce fragmentation.	GCC; FI; other agencies	Medium to long term	Increased awareness and use of the trails	Plan developed. Action plan agreed.

Objective 17: Increasing accommodation provision where needed

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
17.1 Work with partners to encourage small scale and unique sustainable accommodation development, including identifying suitable sites for wild camping on state land.	Work with Fáilte Ireland, state landowners, the communities and industry to identify and develop small scale and unique sustainable accommodation that supports outdoor activities. This should include the repurposing of under-utilised land and buildings where possible. There is an opportunity for a collaborative approach to developing two or three sites for wild camping, on Coillte, NPWS and/or BNM and with GCC providing toilets and showers. This would support dispersal of tourism and would be a good fit for the Geopark area as well as Derroura and the north east of the County. (Potential funding through Just Transition Regenerative Tourism and Placemaking, Strand 3: Alternative Low Carbon Accommodation).	FI; GCC; ÚG; Coillte; NPWS	Medium to long term	Availability of a wide variety of sustainable, unique and small scale accommodation/camping sites across the County	Number of new units.

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
17.2 Incorporate the findings of the national reviews of potential for RV sites and support the introduction of a number of Aire-style RV stops in less visited areas across the County.	The development of RV infrastructure across quieter areas of the County would bring valuable additional revenue to areas that need it and help build awareness without much investment in built infrastructure. These should be sited close to, or in, villages and small towns where there are basic facilities (shop, fuel, pub with food) and attractive surroundings with trails/waterways. Reviews are currently underway by FI and WI.	FI; WI; GCC; Coillte; NPWS	Medium to long term	Network of Aire-style sites supporting tourism to less-visited areas of the County	Review completed. Action plan agreed.
17.3 Support small-scale hotel developments in larger towns where there is evident need	There is a gap in hotel accommodation in specific towns, in particular Ballinasloe, Tuam and Uachtar Árd.	Commercial operators and community groups; GCC; FI	Medium to long term	Increased capacity to provide for overnight tourism in key towns.	Identification of relevant towns. Increased hotel capacity in each town.

Objective 18: Providing additional visitor attractions/attractor where needed and ensuring quality of same

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
18.1 Explore opportunity to establish maritime heritage destination visitor attraction	Attractions and festivals highlighting coastal culture and boating heritage is a key USP of this region and links to south west Galway. A new destination level attraction in this area, e.g. one based on a maritime theme such as the Galway Hooker, has the potential to act as a portal to this heritage as well as a physical gateway to Ceantar na nOileán. It would also encourage water-based activity along the western coast and tie in to the Galway Hooker Races.	GCC; FI; ÚG	Medium to long term	New maritime themed destination attraction in south Conamara	Agreement on how to proceed. Action plan agreed.

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
18.2 Review of smaller / less visited Council and community owned visitor attractions	Review smaller visitor attractions to establish development needs (i.e. quality of experience and range of facilities) and to explore opportunities for them to play a bigger role in their locality (e.g. tourist information, facilitating new experiences and activities, integration with other experiences in the area). Specific attractions for consideration include: the Battle of Aughrim visitor centre; Athenry Visitor Centre; Ballyglunin Railway Station.	GCC; FI; individual attractions	Short to medium term	Improved visitor experience and greater visitor numbers at selected visitor attractions	Review complete. Action plan agreed.
18.3 Work with agencies to maximise opportunities of heritage assets, including those in State care	State agencies OPW and NPWS are custodians of sites that have visitor appeal in Galway. There are opportunities for the promotion and sustainable development of these - some of which have been called out separately (e.g. Ross Errilly). An agenda needs to be agreed with each, and consideration also given to shared objectives, e.g. promotion to visitor of sustainable tourism objectives. Also continue to support those in Council ownership, e.g. Battle of Aughrim Centre.	NPWS; OPW; GCC; FI	Ongoing	Improved visitor experience and greater visitor numbers at state-owned visitor attractions	Sites selected. Plans and actions agreed.

Strategic Theme 3: Skills and Capacity Development

High Level Goal 3: To ensure the tourism industry is skilled and has the capacity to deliver engaging and high-quality visitor experiences.

Objective 19: Enhanced peer learning and networking of the tourism industry

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
19.1 Establish a whole County industry network of stakeholders for skills sharing and cross-selling	Though the Galway tourism industry has been organised into existing groups such as Galway Convention Bureau, Discover Lough Derg and Connemara and Islands Tourism Network, there is an opportunity to have one or two regular network meetings per year of a whole County group and to link in Galway Local Enterprise Office, Fáilte Ireland, Údaras na Gaeltachta and Regional Skills West team members to highlight opportunities that exist with training, mentoring and networking.	LEO; Industry	Short to medium term and then ongoing	Greater knowledge sharing and cross-County peer mentoring	Network structure and approach agreed; participation rates.

Objective 20: Supporting industry skills development

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
20.1 Promote existing training and continuing professional development opportunities to industry (see Communications below)	There are ongoing skills and capacity development, as well as training and continuing professional development opportunities provided by Fáilte Ireland and other agencies. Industry should be encouraged to make the most of these. (Note: sustainability training included under 1.2 above). The developing BIA Innovator Campus should also be integrated in delivering food-related workshops/training.	FI; GCC; LEO; BIA ; Regional Skills West	Ongoing	Excellent delivery of visitor services and experiences by industry	Participation rates. Satisfaction of visitors as measured through existing feedback mechanisms and social media reviews.

Strategic Theme 4: Marketing and Communications

High Level Goal 4: To ensure consistent, clear and relevant communication with key audiences, including stakeholders and the public.

(See also actions in Strategic Theme 1 and the outline Marketing Plan that follows).

Objective 21: Supporting collaboration between GCC and the tourism industry

Actions	Rationale & Commentary	Partners	Timeframe	Outcomes	KPI
21.1 Establish industry forum and network	A forum and network is the first step towards a more unified approach to industry development and marketing in the County. Sub-networks/fora can also be established over time, as needed.	GCC; FI; G City; industry	Short term	Enhanced communication and collaboration among tourism stakeholders	Forum and network established. Participation rates

A8.2 Marketing Plan

Action Area	Action	Target Market/Segment
1. Brand Development	Considerable progress has been made on developing the new brand. Once finalised, a communications plan is required to support widespread adoption and use.	All
2. Collaterals - Print/Digital	To be reviewed pending outcome of decision on implementation structure. Print to be minimised, with focus on digital (easier to update, more used by consumers).	All
3. Digital Marketing	3.1 Develop dedicated digital marketing strategy that will encompass the items below, either using an in-house shared staff resource or by appointing external specialist.	All
	3.2 Develop and optimise dedicated website that includes interactive maps of: experience providers; visitor attractions; Greenway, Blueway and outdoor trails; beaches; and other nature-based 'assets'.	All
	3.3 Regular management of key social media channels: Facebook, Twitter, Instagram, Pinterest, Youtube and TicTok. Develop regular campaign of imagery and stories to feed existing opportunities through Tourism Ireland and as snackable, shareable content.	All
	3.4 Management of reputation on other third party and travel sites	All
4. PR and Communications	4.1 Agree publicity programme to accompany key strategy developments and major festivals/events, either via a shared staff resource or by hiring in the service. Programme should be agreed in advance and clearly branded - Galway brand for domestic markets, IHH or Wild Atlantic Way for overseas.	All
	4.2 Encourage and facilitate regular media visits from target markets, including specialist media trips via TI/FI.	All
	4.3 Regular use of online competitions with shareable content (e.g. photo competitions, best holiday experience, etc.) as publicity tool	Adult segments who are available to travel off season
5. Promotions	5.1 Facilitate industry participation in/at key trade and consumer promotions organised by tourism agencies and encourage optimisation of the opportunities for networking and direct sales.	Varies by event
6. Direct Marketing	6.1 Collaborate with relevant industry on direct marketing campaigns to group organisers	Incentive & Events Organisers; Walking Clubs; Cycling Clubs; Wheelchair Association and groups for people with disabilities
7. Advertising: Print & Digital	7.1 Advertorials at key decision-making times of the year in leading Irish media, supported by industry advertising	All domestic segments: families, weekend breaks, outdoor actives
	7.2 Promotion of off-season breaks to digital nomads supported by industry advertising	Domestic adults
	7.3 Specialist advertising in niche media and specialist online platforms e.g. Angling Times, Senior Times, Rollercoaster,	Niche markets
8. Destination Marketing	8.1 Continue to support the platforms associated with established destinations, including Conamara and Destination Lough Derg by cross selling the destinations on social media. Continue to work with TV productions companies and tourism officers to develop editorial material for domestic and international marketing.	Tourism networks; ÚG; WI; FI; GCC; TCC; CCC

