

Commissioned by:

Ballina Lions Club



We Serve

Moy Estuary

Development Strategy “A Shared Vision”

July 2020



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FOREWORD

This strategy sets out a shared vision for a new area based development and economic strategy to encompass the whole of the Moy Estuary region and wider catchment. It is now up to each of the stakeholders involved to take forward and implement.

The extensive consultation process, key to the successful development of the strategy, was a valuable opportunity to review the direction which our area is taking and to provide new ideas and input to improve that direction. Ballina Lions Club are deeply impressed and grateful by the very high level of engagement from business, communities, individuals and public bodies who have provided very detailed and clear input to this plan. The significant amount of consensus and ownership which was evident through the consultations demonstrates that there is a bright future for the region. There is a strong recognition and willingness from all involved to work together to build a better and more sustainable local economy and higher quality of life for all.

Ballina Lions Club see the Moy Estuary area as being increasingly confident about its image, its strengths and future direction. We are grateful to all who have participated and especially to the members of Ballina Lions Club who have dedicated so much time and effort.

However, now is not the time to sit back, despite this region being known for its scenic beauty and the River Moy as one of the top salmon angling rivers, the area is far from realising its potential. From a tourism perspective it operates and competes in a highly competitive global environment for both domestic and overseas visitors. The challenge faced by global economics as a result of the Covid 19 pandemic in 2020 will have long reaching repercussions for travel requiring business and destinations to truly innovate not only to build back business but to offer new and sustainable experiences that work. There are many other challenges that need to be addressed and a collaborative strategy, involving all stakeholders, is vital if these are to be overcome. Above all, we owe a duty to future generations to ensure our growth is not at the expense of their opportunities.

This strategy represents a major step forward for the Moy Estuary Region and the towns of Ballina, Killala and Enniscrone. It sets out ambitious yet relevant and achievable projects that can give the area a leading position as a destination and place to see within Ireland and also increases its international potential and is a significant add on to the product of the Wild Atlantic Way. To do this all stakeholders must work together positively and cohesively. The strategy will support our businesses and public bodies to acquire and direct investment in line with national priorities.

Achieving the economic potential of our area does not rest with one agency or local authority. Everyone has a part and must play that part whether as a catalyst, a facilitator, an investor or promoter. This plan is drawn up based on the principle of cooperation where everyone working together towards a common vision and aims will ensure that we achieve.

Ballina Lions Club
July 2020

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1. EXECUTIVE SUMMARY

OVERVIEW

Ballina Lions Club commissioned the preparation of this long range strategic plan for the area of the Moy Estuary. This covers the area encompassed by Killala, Ballina and Enniscrone and their hinterlands. The plan covers an initial 6 year period with further long term growth and development objectives and actions.

The aim of the plan is to provide an agreed and collaborative framework for the sustainable growth of the areas tourism industry. Underpinning this is the need to provide for orderly and managed developments that will realise strong economic return from the regions natural, cultural and heritage based assets, but doing so in a way that ensures environmental and economic sustainability and practices. Central to this approach is collaboration and cooperation across the area between, private, statutory and community stakeholders where there is an agreed vision and set of objectives.

PLAN RATIONALE

The plan therefore lays the framework for strategies and actions that address the challenges within the area and build on the latent opportunities to produce sustainable growth in the Moy Estuary region.

To increase the volume of demand for tourism services in the area and grow market opportunities the strategy through extensive consultation focuses on building on the attributes that the River Moy has as the central archery. A signature project was identified which should be developed over the course of this plan. This project “The Moy Estuary Greenway” provides a platform to:

- ❑ Facilitate access and opening up of a much wider choice of visitor experiences and things to do within the region
- ❑ Provides a physical link based around leisure between Killala, Ballina and Enniscrone
- ❑ Opens up many sites, places along the Moy and gives new uses to areas such as the Ballina Quays
- ❑ Facilities and supports the development of a wide range of attractive visitor experiences and activities for visitors along the greenway, thus lengthening stay and creating activity.

PLAN STRUCTURE

Greenways are a proven visitor concept that generate overnights, visitor spend and become a signature attractor for an area. The principle objective is to create a linear Greenway linking Killala – Ballina – Enniscrone along the River Moy.

Underneath this a series of related thematic actions will ensure the development of market appealing visitor experiences for a wide range of consumer segments and both domestic and

international markets. An enhanced marketing and promotions programme is proposed as well as ongoing capability building across the regions industry.

Figure 1: Development Structure



IMPLEMENTATION

Strong local delivery and management is critical to the success of this plan. Delivery must happen on a partnership basis with collective actions and agreement of all stakeholders. Important stakeholders from the private sector, public sector and community will come together in a partnership model, drawing up annual implementation and action plans. There are already in place strong working structures across the area with the North Mayo Promotions Office who have in place a Destination Steering Group and implement annual sales and marketing programmes in national and international markets each year. They are supported through industry contributions, Moy Valley Resources and Ballina Chamber of Commerce.

It is proposed not to duplicate already existing structures but to build on and work with them. The North Mayo Promotions Office Destination Steering Group will be the used as the basis for the implementation of this plan and expanded as necessary with additional members. It will be charged with setting and monitoring an annual work plan. The group will meet on a quarterly basis to review progress, make decisions as necessary and adjust the strategy as required. The group will delegate roles and actions to specific partners who are best placed to deliver. The promotions, marketing and sales work will be led by North Mayo Promotions Office who will also have an important role with other partners in product and experience development. In addition a lead overseeing partner will be appointed with a dedicated professional resource to be the driving force behind the implementation of the strategy.

The proposed structure is based on a tripartite structure representing the interests of all stakeholders from both counties Mayo and Sligo. The destination steering group will agree annual implementation plans and key performance indicators and monitor these on a regular basis. The

implementing team will have strong operational capacity and will be responsible for implementing and driving the plan.

COSTS

Table 1 sets out a summary of the costs of delivery over the next 6 years across all themes. It is acknowledged that the steering group will have to secure investment and funding through accessing various sources of public support for projects. The timing of funding will in part dictate the timing of action delivery.

Table 1: Investment Costs

Plan Implementation Costs excl Greenway	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Visitor Experience and Product Development	121,000	1,205,000	2,005,000	2,008,000	105,000	5,444,000
Marketing and Awareness	61,000	36,500	36,500	36,500	36,500	207,000
Implementation	85,750	85,750	85,750	85,750	85,750	428,750
Education and Skills	13,550	13,550	13,550	13,550	13,550	67,750
TOTAL	281,300	1,340,800	2,140,800	2,143,800	240,800	6,147,500
Projected Costs of Greenway Development						9,625,000
Overall Investment under Plan						15,772,500

IMPACTS

The impacts of the investments proposed are projected to deliver the following returns to the area. Estimates and calculations of visitor spend are based on:

- ❑ Average spend per head for domestic and overseas visitors from Failte Ireland Research
- ❑ Visitor bed nights generated based on those bed nights generated by the Great Western Greenway as per the Economic Impact Report carried out by Fitzpatrick & Associates
- ❑ Jobs created is based on tourism employment indicators as provided by Failte Ireland Research

GREENWAY ONLY

- ❑ 25,000 visitors to the Greenway excluding local users in year 1 rising to 47,000 in year 6
- ❑ Generating 30,000 bed nights in year 1, rising to 90,000 in year 6
- ❑ Generating a visitor spend in the region of €1.65m in year 1 rising to €6.095m in year 6
- ❑ Supporting 58 jobs in year 1, increasing to 214 in year 6

TOTAL IMPACT

- ❑ 96,000 visitors in year 1 rising to 145,000 in year 6
- ❑ Generating 42,000 bed nights in year 1, rising to 107,000 in year 6
- ❑ Generating a visitor spend in the region of €5.5m in year 1 rising to €12.5m in year 6
- ❑ Supporting 193 jobs in year 1, increasing to 440 in year 6

Induced economic impacts as a result of the circulation of earnings within the local economy and the purchase of supplies and services is estimated at €7.12m in year 1 rising to €16.3m in year 6.

2. INTRODUCTION

A Shared Vision – presents a long range tourism and economic development strategy for the Moy Estuary Region encompassing the towns of Ballina, Killala and Enniscrone. It identifies a series of ambitious projects that will position the region as a leading visitor destination and utilise in full in a sustainable manner the natural, cultural and heritage resources of the area.

MOY ESTUARY AREA

The Moy Estuary region includes the towns of Ballina, Enniscrone and Killala and the geographical hinterland encompassed by these towns. It is an area with strong communities and rich in natural and cultural resources, including the Moy River famed for its salmon angling.



PURPOSE OF THE STUDY

This Plan is an initiative of the Ballina Lions Club. Ballina Lions Club is an integral part of Ballina Community where it works and supports the efforts of voluntary, business and community groups in Ballina to enhance the economic, social, cultural and community wellbeing of the area.

This Study was prepared in association with participating community, business interests and stakeholders and participating statutory bodies including Mayo and Sligo County Councils.

The purpose is to provide leadership and direction to the region's tourism industry. The study undertook an assessment of the commercial, touristic, community and social benefits and uses of the Moy Estuary. The plan serves to facilitate a shared mission and vision amongst stakeholders to develop a sustainable and valued visitor economy benefiting the entire region. This is a long range plan and calls for a collaborative approach to the development, management and marketing of the region that contributes positively to its economic, environmental, social and cultural health.

It lays a framework for strategies and actions that address the challenges and capitalise on the opportunities to produce sustainable growth in the Moy Estuary region. A primary aim is to

increase visitation and revenue from tourism through the provision of quality and compelling visitor experiences, providing significant economic benefits to local communities.

The plan ensures that any proposed developments safeguard the natural resource that is the Moy Estuary and that it is developed in a sustainable way, retaining and returning value to the local community from a commercial, social and environmental perspective. Local involvement of community, residents and the commercial sector is essential in implementation and management of projects and actions.

AIMS AND OBJECTIVES

The aims and objectives of the plan are:

- ❑ Present a full review and feasibility of the commercial, social tourism, economic, community uses, benefits and values that could be developed along the Moy Estuary
- ❑ Identify suitable projects and outline development plans indicating finance, development path and justification for each project.
- ❑ Present the development plan and projects in terms of priority
- ❑ Identify the benefits and impacts of each project in the context of social, community, tourism and economic impact
- ❑ Identify likely sources of support including funding, development partners and operational requirements
- ❑ Consult with local communities and stakeholders including key land and property owners, local residents and communities, business interests and public bodies
- ❑ Identify how any developments can link into other projects and initiatives such as the Wild Atlantic Way and how they can benefit each other
- ❑ Increase visitor numbers and revenue to the region in a manner that provides for future sustainability
- ❑ Facilitate economic growth and create sustainable employment
- ❑ Recommend governance and management processes for the implementation of the plan

The Plan proposes key initiatives and projects many of which will require detailed planning, supporting business cases, and stakeholder commitment and cooperative action to bring to fruition. Short-term strategies and actions are focused on being affordable and achievable (realistic) and will establish the foundations for a significant increase in public and private investment in the medium and longer term.

The Plan identifies that the visitor economy could be the major economic driver for the area. For success, a true collaborative approach by all stakeholders is needed. Most importantly, it requires the area's communities to be inspired by how the visitor economy contributes to their lifestyles, and to embrace the opportunity to share their part of the Moy Estuary with visitors.

3. PLAN DEVELOPMENT PROCESS

OVERVIEW

Tourism operates in a rapidly changing consumer landscape driven predominately by the desire of visitors to experience new and invigorating experiences. It also is an industry competing globally for customers and their money. It is highly sensitive to external factors such as economic slowdowns, political events or as experienced during 2020, the Covid 19 virus outbreak. The industry must be resilient and be prepared to encounter sharp and unexpected downturns from time to time.

Ballina Lions Club, in partnership with key stakeholders, commissioned the development of a wide ranging feasibility study and plan to drive economic and visitor growth in the Moy Estuary region over the next 10 years.

The process of the development of the plan followed a number of key elements:

1. Review and analysis of market data, trends and market intelligence
2. Desk research to benchmark the areas experiences and planned developments against peers and competitors in Ireland and abroad
3. Consultation with a range of business, community and statutory stakeholders to ensure alignment with their plans and policies.
4. Review of national, regional, county and local plans and policies of relevance to the Moy Estuary region

It will be important that the plan is reviewed and, as necessary, adjusted over its lifetime to take account of new emerging opportunities and funding streams as they arise. The management and governance arrangements will ensure that regular reviews of progress and implementation take place in addition to reviewing the external environment so that any necessary adjustments can be made.

CONSULTATIONS

Over 300 individuals and organisations were consulted and actively participated in the building of this plan, including businesses, community organisations, statutory bodies, the local authority and individuals. The development of the plan was framed within the consultation feedback and stakeholder priorities in the region.

DEVELOPMENT MODEL

The need to balance the requirements of the tourism industry and visitors and other stakeholder groups is important. The plan was developed using the VICE Model for tourism development

which incorporates visitor, industry, community and environmental considerations. This is summed up as follows:

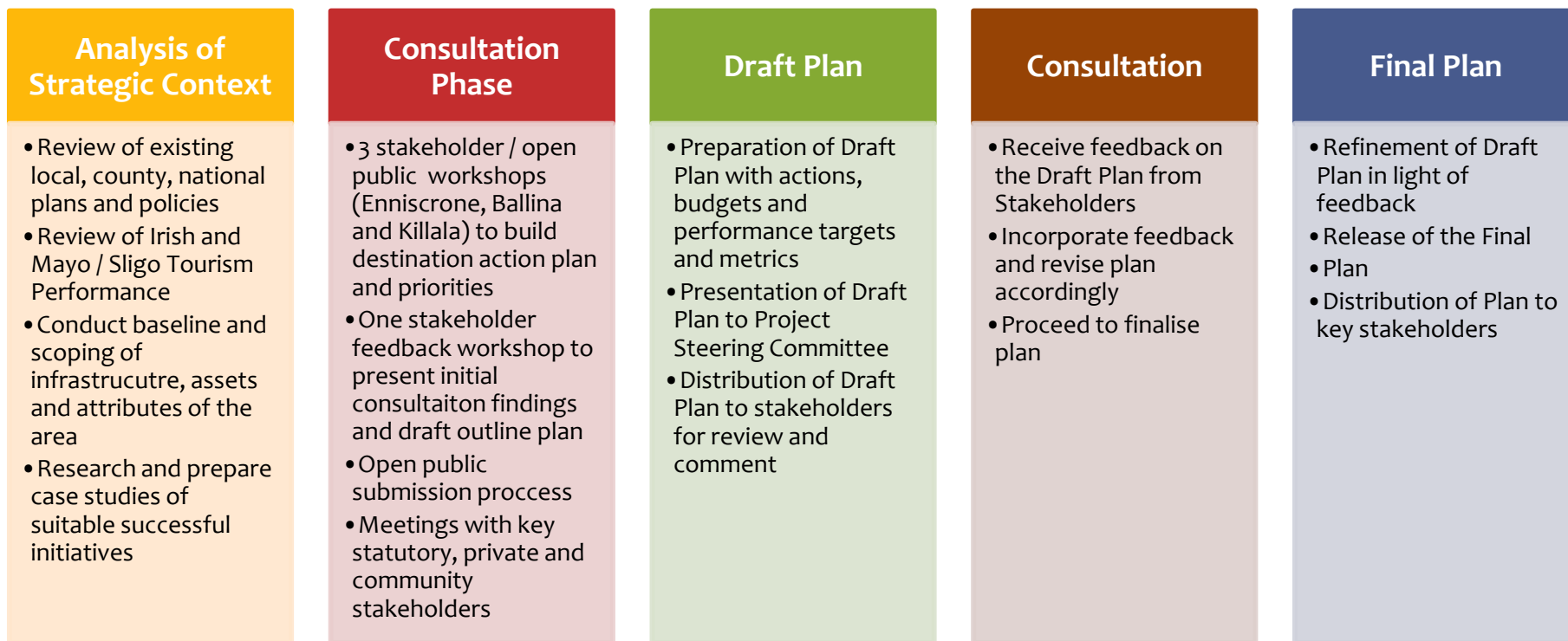
Tourism development must:

- ❑ **VISITORS** - Welcome, involve and satisfy visitors
- ❑ **INDUSTRY** - Achieve a profitable and prosperous Industry
- ❑ **COMMUNITIES** - Engage and benefit host communities
- ❑ **ENVIRONMENT** - Protect and enhance the local environment

The strategy sets out a bottom up development model where actions are based on priority and desires of the host region that includes the community, statutory, private and public sectors and individuals. Its sets out:

- ❑ An agreed vision for the area which addresses the needs of the industry, the community and visitors.
- ❑ A focus on building on the work and initiatives already done
- ❑ Gives a platform for agencies, local authorities, the private sector and communities to work together on a cross county basis.
- ❑ Deploys an implementation mechanism to ensure that resources are effectively invested and monitored and provide evaluation and monitoring mechanisms
- ❑ Ensures that any development is sustainable through strategic management which ensures a quality visitor experience and return to the local host communities

Figure 2: Plan Development Process



4. TOURISM INDUSTRY OVERVIEW

According to the World Travel & Tourism Council, globally 292 million jobs are supported by tourism which accounts for 1 in 10 jobs in the global workforce and Tourism provides 10.3% of the world's GDP. By 2027, it is anticipated that the sector will be supporting over 380 million jobs, as Travel and Tourism continues to grow.

GLOBAL AND MACRO TRENDS

Recent research undertaken by Sabre,¹ states that 50% of the travelling population by 2020 will be millennials. These travellers are extremely peer led (sharing on social media is a key platform for their interactions and consumable media). They measure attractiveness of destinations via **experiences** they can partake in, **authenticity** of the experience and **exploration** of unusual and hard to find sights and locations.

The World Travel & Tourism Council (WTTC) 2017 Annual Economic Reports give deep insights into the global travel industry and factors that will shape its future growth. Going forward, destinations that are able to capitalise on changing expectations with speed and agility are more likely to succeed and grow. Visitor experience is integral to core travel product offerings and those that are centred on authenticity, personalised experiences, removal of friction and on-demand functionality will win out. This means that destinations and experience providers need to focus on:

Customer Experience – Tourism providers must shift thinking to make customer experience paramount. This will require an increased awareness of customer expectations, re-imagined experiences and appropriate technology strategies, and differentiated offerings to provide unmatched travel experiences.

Lever existing and emerging technologies – The potential provided by the Internet of Things is immense. Destinations need to understand what technologies consumers are ready to adopt, and what experiences will drive real value.

Mobile Technology - Customer engagement will continue to see massive shifts towards mobile communications, engagement and information provision.

Visitor Experiences – Research indicates many experiences leave customer needs unmet. These include the:

¹ Sabre are one of the world's largest travel and technology companies

- ❑ Desire for authenticity, active discovery and being connected
- ❑ Expectation of transparency and flexibility
- ❑ Appreciation for feedback loops
- ❑ Eagerness for simplified interactions and payments

Understanding and identifying these needs among customers opens an alternative path and offers competitive advantage to a destination.

TOURISM TRENDS - IRELAND

The global marketplace is changing at an ever-increasing rate so an understanding of trends, customers and source markets is vital in framing and developing experiences. Visitor motivations are becoming increasingly varied and complex. The emergence of new destinations and experiences as well as easy access to information via the digital world makes the tourism industry a very competitive market-place. Examination of recent Irish tourism performance and trends will aid understanding of:

- ❑ Visitor motivations and reasons to visit
- ❑ Understanding future consumer behaviour
- ❑ Understanding competition
- ❑ How to develop future proofed business and strategy models

Examining trends before the downturn caused in 2020 by the Covid 19 outbreak, Tourism in Ireland was growing strongly. It is expected that while recovery may be slow and travel patterns change the fundamental appeal of Ireland as a destination will remain.

Tourism in Ireland continued to grow substantially, with record growth in 2015, 2016, 2017 and 2018. In 2018, Ireland received 9.580 million overseas visitors a 6% increase on 2017 and a 34% increase since 2014. Spending by overseas visitors in Ireland amounted to €5,208.9 billion representing a spend of €543 excluding carrier receipts per overseas visitor. This was the strongest year on record. These numbers now surpass the targets set in the national policy “People, Place and Policy, Growing Tourism to 2025” for 2025.

A significant challenge now faced in popular tourist destinations in Ireland is that of lack of capacity of visitor attractions and the accommodation stock to cater for the number of visitors. This presents opportunities for lesser visited destinations to present themselves as an “uncrowded” and appealing place to visit. The success of the Wild Atlantic Way in attracting visitor numbers along the Western Seaboard is well acknowledged. The Wild Atlantic Way is one of Ireland’s key overseas marketing and product / experience propositions, based around the natural scenery, culture and heritage of the West Coast. It is the objective of Failte Ireland to use the Wild Atlantic Way as a hook and mechanism to encourage visitors to explore places and areas close to the route.

TOURISM IN COUNTIES SLIGO AND MAYO

The tourism sector in counties Mayo and Sligo is an important component and driver of the economy. It contributes €282 million annually to the local economy and generates over 1.247 million visitors. It supports employment of over 7,600 either directly or in service and supply industries that support the tourism industry.² The latest year for which regional and county data is available is 2017 show:

Table 2: Headline Tourism Statistics for Co. Mayo and Sligo

	Sligo	Mayo
Overseas Tourist Numbers	173,000	324,000
Overseas Revenue	€45m	€78m
Domestic Visitors	247,000	503,000
Domestic Revenue	€51m	€108m
Total Revenue	€96m	€186m

For 2018, Tourism Ireland reports that overseas visitor numbers increased by 6% and revenue by 10% for 2018. Applying this to the performance of counties Sligo and Mayo means arrivals of 526,000 overseas visitors and revenue of €310 million. This gives confidence in the feasibility of developing new tourism attractions and activities in the Moy Estuary region.

Overseas visitors spend is broken down 30% on accommodations, 36% on food and drink, 6% on sightseeing and entertainment, 14% on transport and 13% on shopping.

SOURCE MARKETS

The counties of Mayo and Sligo have a relatively balanced spread of visitors from the main overseas source markets as indicated below. Domestic visitation accounts for 60% of total compared to the national average of 51%, indicating a large reliance on the domestic visitor market. As overseas visitors spend higher on accommodation, food / drink and shopping, increasing the overall market share from overseas visitors should be seen as a priority. The largest source markets are Mainland Europe followed by Great Britain and North America.

Table 3: Source Markets

Market	% of Visitors	% of Revenue
United Kingdom	11%	14%
Mainland Europe	17%	17%
North America	10%	11%
Other	2%	2%
Domestic & NI	60%	56%

The counties of Sligo and Mayo are located along the Wild Atlantic Way with the signature points of Mullaghmore Head in Sligo and Downpatrick Head in Mayo. Ballina, Enniscrone and Killala are 3

² Failte Ireland - Every €1mn of tourist expenditure helps to support 27 tourism jobs.

key towns along the Sligo / Mayo coast of the Wild Atlantic Way. They are perfect bases to enjoy the stunning coastline and the many attractions close by. Ensuring visibility of the region will help in increasing the visitation from the high numbers of visitors along the Wild Atlantic Way. It will bring new and unique experiences to international and domestic visitors, easing congestion and giving new authentic experiences which are sought by today's tourists.

CHALLENGES AND OPPORTUNITIES FOR THE MOY ESTUARY

The Moy Estuary Area has a number of significant supply and demand challenges and opportunities. These include:

- ❑ Product development, both existing and new, is required to meet market demand and preferences
- ❑ The outstanding diverse natural landscape of the coast, river, wildlife, flora and fauna and the built heritage of the area present opportunities for high quality interpretation and visitor experience product development.
- ❑ Management of the tourism impacts on the area need to be managed sustainably
- ❑ Issues associated with high visitation need to be managed such as impacts on the environment.

This Plan aims to sustainably manage and grow the tourism economy, recognising the importance of the economic, environmental and social health of the Moy Estuary region. The focus of this plan is on both slowly increasing numbers but also visitor yield through enhanced visitor experiences. This will be achieved through improving existing experiences, developing new experiences and infrastructure.

KEY MARKET SEGMENTS – MOY ESTUARY REGION

According to the statistics, counties Mayo and Sligo experienced a steady annual increase of overseas visitor numbers since 2012, and welcome approximately 500,000 visitors per year. Mainland Europe is currently the region's largest overseas market segment, followed by the UK and North America. The attractiveness of the tourism products and experiences of the region is its scenery; natural attractions and strong culture are key attractors for these source markets. They will continue to be so due to the growing international awareness of the Wild Atlantic Way. The visitor experiences that are present and those with potential for development such as the Greenway and the opening up the many heritage based sites will directly appeal to these markets due to their high cultural content and scenic value.

The domestic market contributes 60% of all visitors to Mayo and Sligo. The domestic market will continue to be an important source market for the region. As Irish people take short breaks at home, they are seeking interesting and immersing visitor experiences. They require new experiences and products that offer a wide range of different things to do, see and engage in. The domestic market will be a significant market segment to provide business in the off-peak season and a contributor to extending the season for tourism operators.

5. POLICY AND STRATEGY REVIEW

INTRODUCTION

The success and competitiveness of a tourism destination depends not only on the collection of products, services and experiences but also on the application of clear development objectives and collaboration among stakeholders. Starting at national level policies and objectives filter down into regional and county policies and priorities where development of new tourist product and experiences are set within the framework. Without this, developments have less chance of success, as they will not be able to fully capitalise on the many initiatives and programmes that national policy implement. This section sets out the relevant national and regional policy frameworks relevant to the Co. Mayo and Co. Sligo and the Moy Estuary.

This Report has been prepared with reference to the following documents:

- People, Place and Policy – National Tourism Strategy to 2025
- Wild Atlantic Way Operational Programme 2015-2019
- National Rural Development Action Plan 2014 - 2020
- Destination Mayo - A Strategy for the Future of Development of Tourism in Co. Mayo 2015 - 2020
- Mayo County Development Plan 2014 - 2020
- Sligo County Development Plan 2017 - 2023
- Mayo Local Economic and Community Plan 2016-2021 (LECP)
- Sligo Local Economic and Community Plan 2016-2021 (LECP)
- County Sligo Heritage Plan 2016 - 2020
- Project Ireland 2040 (National Planning Framework)
- Failte Ireland Research and Strategy
- Failte Ireland Capital Investment Programme 2019 - 2023
- Regional Planning Guidelines

PEOPLE, PLACE AND POLICY, GROWING TOURISM TO 2025

Published in March 2015, People, Place and Policy, Growing Tourism to 2025 is the Government's National Tourism Policy and it sets out ambitious goals for tourism in Ireland. The policy sets out ambitious headline targets for Irish Tourism to 2025. These are:

1. By 2025, revenue from overseas visitors, excluding carrier receipts³, will increase to €5 billion in real Terms (i.e. excluding the effects of inflation).

³ Payments made to inbound carriers to Ireland such as airlines, ferry companies and tour companies

2. Employment in the tourism sector will be 250,000 by 2025, compared with around 200,000 at present.
3. There will be 10 million visits to Ireland annually by 2025.

The policy statement is specific in terms of the actions that will be implemented to achieve the goals. The marketing of Ireland as a visitor destination will be evidence based and targeted at a range of geographical and segmental markets with the highest revenue growth potential. The tourism industry will be expected to make a greater contribution to destination marketing activity in regions and segments where awareness of Ireland is already high. The policy statement provides for the realignment of tourism marketing around experiences that motivate visitors and the consumer segments that are most likely to select Ireland as a destination. State and public supports for capital investment provide a lasting improvement in the overall quality of the visitor experience. The policy prescribes an enhanced role for local authorities in leadership, innovation and development and identifies supports to aid this.

Related to this on the supply side is a re-framing and repositioning of those assets and experiences in which the most promising market segments have expressed an interest. This has resulted in the four national propositions of:

- The Wild Atlantic Way
- Ireland's Ancient East
- Irelands Hidden Heartlands
- Dublin

WILD ATLANTIC WAY

The Wild Atlantic Way is Ireland's first long-distance touring route, stretching along the Atlantic coast from Donegal to West Cork. The overall aim of the Wild Atlantic Way is to develop a long-distance touring route that will achieve greater visibility for the west coast of Ireland in overseas tourist markets. The Wild Atlantic Way will:

- Assist in increasing visitor numbers, dwell time, spend and satisfaction along all parts of the route
- Re-package the Atlantic seaboard as a destination to overseas and domestic visitors
- Improve linkages between, and add value to, a range of attractions and activities
- Improve on-road and on-trail interpretation, infrastructure and signage along and around the route
- Direct visitors to less-visited areas
- Build on the work completed in these areas already and assist businesses, agencies, local groups and other stakeholders along the area to work together
- Reinforce the particular strengths and characteristics of all of the areas located along the west coast, while offering the visitor one compelling reason to visit

The development of new product and experiences should align to the operational programme of the Wild Atlantic Way. The Wild Atlantic Way Draft Operational Programme 2015-2019 sets out the key strategy and actions for the development, branding and marketing of the WAW. It has

four key goals and this project directly supports addressing each of these Goals, which are summarised as:

1. To ensure that the Wild Atlantic Way becomes a world-class visitor experience
2. To deliver balanced and sustainable revenue and jobs growth with greater geographic and seasonal spread.
3. To ensure that the Wild Atlantic Way delivers benefits to local communities
4. To ensure that the implementation of the Wild Atlantic Way Operational Programme facilitates the protection, enhancement of the environment of the west of Ireland

Action 15 states - To help businesses to improve the packaging of experiences and services to contribute to a more seamless visitor journey particularly those which bring the landscape, culture and activities on the Wild Atlantic Way to life.

Indicative Project – Killala, Ballina, Enniscrone Greenway

Action 30 states - Engage local communities in a series of local interpretation projects, in association with, inter alia, the Heritage Council, the Local Authorities, Údarás na Gaeltachta, the OPW and the NPWS, building on previous work undertaken by these stakeholders, which explore and highlight the distinctive Irish Atlantic culture in destinations and communities all along the Wild Atlantic Way.

Indicative Project – Monasteries of the Moy

Action 32 states - To work with local communities and local tourism providers to further explore opportunities to introduce elements of the Irish Atlantic heritage and culture to existing and new tourism offerings in a way that creates richer and more authentic cultural experiences for visitors

Indicative Project – Monasteries of the Moy

REALISING OUR RURAL POTENTIAL - ACTION PLAN FOR RURAL DEVELOPMENT 2017

The Action Plan for Rural Development is aimed at delivering real change for people living and working in rural Ireland. The Plan contains 276 actions across five key pillars, all of which aim to improve both the economic and social fabric of rural Ireland. The Action Plan for Rural Development embraces the recommendations of the Commission for Economic Development of Rural Areas report completed in 2013. Pillar 3 of the Action Plan recognises the importance of tourism to the rural economy and is aimed at maximising the rural tourism and recreation potential with key objectives that include:

- ❑ Increase tourist numbers to rural Ireland by 12% by 2019.
- ❑ Support sustainable jobs through targeted rural tourism initiatives, including through the support of key marketing initiatives such as Ireland’s Ancient East and the Wild Atlantic Way, as well as developing the potential of Ireland’s Lakelands.
- ❑ Develop and promote Activity Tourism in rural areas through the development of blueways, greenways and other recreational opportunities.

- Develop and promote natural and built heritage through investment and development of Gaeltacht areas, enhanced promotion of National Parks and Nature Reserves and other natural and built resources

DESTINATION MAYO - A STRATEGY FOR THE FUTURE DEVELOPMENT OF TOURISM IN CO. MAYO

Produced by Mayo County Council, this is the strategy for tourism development to 2021. This report identified tourism as a key economic sector for Mayo with the potential to create 1,000+ jobs in the medium to long term (years) in addition to the existing 4,500 existing tourism industry jobs in the county, driving real economic growth.

The vision for Mayo's tourism industry in 2021 is to be a high quality, inclusive and authentic destination. Mayo will have an array of high quality attractions and activity options coupled with a solid selection of accommodation, hospitality services and ancillary service products.

The strategy notes that Mayo has significant potential for new high quality, innovative product development, ranging from the Wild Atlantic Way, Monasteries of the Moy Greenway, expansion of the highly successful Great Western Greenway, Blueway Water Trails, VeloRail, Wild Nephin Wilderness Park and The Mary Robinson Centre in Ballina. Initiatives such as interpretation of the Sacred Landscape, both in East Mayo and along Pilgrim Trails across the county, the famine history of Mayo and facilities for 'hard' adventure activities - both land and water-based - offer unique ways for a wide range of visitors to engage with Mayo's landscape, heritage and people.

Mayo's tourism product is ideally placed to maximise on future tourism trends, offering a green and natural product and memorable experiences. The strategy is built around a number of themes with a strong emphasis on the outdoors and natural product. These are:

WALKING AND CYCLING TOURISM - Investment in Greenway development has proved extraordinarily beneficial for Mayo tourism in the past, and continued investment in greenway development is set out

ANGLING TOURISM - Angling is identified as a key segment given Mayo's resources in this area including its large network of lakes, the River Moy and coastal area where sea angling options are available.

GOLF TOURISM - Mayo has a very good reputation as a golfing destination having 12 golf courses within the county. The county has one of the finest links courses in the world at Carne. Combining this golf product with its scenic landscape, culture, magnificent sea views, Mayo has much to offer the golfing visitor.

ADVENTURE TOURISM - Adventure tourism is a high growth market segment. The adventure sector is a high yield segment with the average activity participant spending 40% more and staying two days longer than average holidaymakers. It links strongly with the themes of walking, cycling and other outdoor pursuits.

WILD ATLANTIC WAY - Mayo is perfectly aligned with the Wild Atlantic Way brand, offering the most quintessential appeals such as, wild, raw, isolated landscapes and seascapes. The Wild Atlantic Way, of which Mayo is the midpoint and heartbeat, offers huge opportunities to showcase the county's wealth of scenery, heritage and culture to international visitors.

PILGRIMAGE & SPIRITUAL TOURISM - Mayo has considerable appeal as a spiritual tourism destination, with 1.6 million people travelling to Mayo annually to visit Knock Shrine. Added to this, Mayo has a rich sacred landscape, with many religious heritage sites from the Monasteries of the Moy to Caher Island, Ballintubber Abbey and Croagh Patrick among the key offerings.

FOOD TOURISM - Mayo with its clean waters, natural scenery and untamed wildness has great food and hospitality at its core.

FESTIVALS AND EVENTS - Mayo has a remarkable calendar of festivals and events. Largely attributable to successful community engagement in tourism in Mayo, many of these festivals have long histories and have become part of the fabric of life in Mayo's towns and villages, often playing an important role in drawing Mayo's Diaspora home on holiday.

COUNTY MAYO DEVELOPMENT PLAN 2014 - 2020

This strategy and plan is closely aligned to a wide range of objectives set out in the Mayo County Development Plan in the areas of tourism development, economic and environmental protection. The County Development Plan recognises the Council's role in supporting renewal and regeneration in rural and urban areas and provision of essential infrastructure that supports enterprise and employment. The Plan recognises the role of tourism in generating employment in both urban and rural areas. The principal objectives of the Development Plan that this strategy aligns to include:

- ❑ It is an objective of the Council to support and promote sustainable tourism development, accessible to all throughout the County and to work in partnership with tourism organisations, and adjoining Local Authorities where necessary, in securing the development of tourism enterprises and infrastructure in suitable locations
- ❑ It is an objective of the Council to work in partnership with Fáilte Ireland to facilitate the development of the Wild Atlantic Region
- ❑ It is an objective of the Council to support and promote the development of walks in the County. It is an objective of Mayo County Council (set out through its Tourism & Food Strategic Policy Committee) to become a walking capital destination in Ireland.

MAYO LOCAL ECONOMIC AND COMMUNITY PLAN 2016 – 2021

This plan supports the objectives of the Mayo Local Economic and Community Plan (LECP) which has been prepared by the Mayo Local Community Development Committee (LCDC). The Mayo LECP sets out, amongst other objectives, to:

- ❑ Promote the attractiveness of hubs towns, other towns and villages by assisting the enhancement of the natural and built environment through coordinated efforts of the Council and community groups

- ❑ Support the conservation and management of Mayo's unique built and natural heritage as a support to economic renewal and sustainable employment
- ❑ Contribute to the development of sustainable integrated communities.

The following LECP actions are directly relevant to the actions proposed in this study

Under the Employment and Economic Development Theme - **Action OBJ1 1.1** "to deliver the Tourism Strategy "Destination Mayo" with specific emphasis on infrastructural development and county promotion." Action OBJ1 1.1 proposes "to ensure that Mayo builds on the 'Wild' brand and continues to position itself as the heartbeat of the Wild Atlantic Way".

In this regard the Moy estuary area offers one of the most scenic areas of Ireland and with the potential of treating visitors to wide array of interests and things to do. Located along the Wild Atlantic Way the creation of new experiences and options for the hundreds and thousands of visitors along that route each year will bring significant local benefits. The Moy Estuary builds on the key assets of – landscape, scenery, heritage, culture, people, existing tourism services and harnessing the existing tourism offerings (already in place) as well as the well-established community effort and expertise that is available locally.

CO. SLIGO LOCAL ECONOMIC AND COMMUNITY PLAN 2016 - 2021

The County Sligo Local Economic and Community Plan 2016-2021 (LECP) aims to improve the wellbeing of the people and the economy of the county through enhanced strategic planning, better targeting and co-ordination of resources and more meaningful impacts for local communities. In the County Sligo LECP tourism is recognised as a priority and one that contains large potential for economic and employment growth. The development of this strategy aligns with and supports Objective 1.5 of the LECP which states:

"Develop and implement an integrated and sustainable tourism strategy for the county and engage all sectors in the collective promotion and development of Sligo"

In relation to product and infrastructure development, some key projects identified and relevant to this plan include:

- ❑ The development of discovery points along the Wild Atlantic Way at Mullaghmore Head, Streedagh Point, Rosses Point, Strandhill, Aughris and Dunmorán Strand, Easkey Beach and Enniscrone Beach
- ❑ Maintain and improve Sligo's piers and harbours in particular those close to the Wild Atlantic Way viewing points
- ❑ Coastal protection works to safeguard local amenities and tourism facilities

Importantly in terms of implementation, the plan places a strong emphasis on collective action between private and public sector stakeholders. This reflects the prominence placed on this approach in the national policy People, Place and Policy, Growing Tourism to 2025.

SLIGO COUNTY DEVELOPMENT PLAN 2017 – 2023

The County Development Plan recognises the great resource the County Sligo has for tourism. It highlights the cultural, literary, historical and archaeological heritage of the county as key assets. The plan recognises the importance of the protection of heritage assets and their contexts and the potential that exists within the county for the industry to expand further. It cites that this can be a driver of activity in more peripheral rural areas, many of which are areas of scenic value. The plan identified some challenges including a lack of accommodation stock to support growth in visitor numbers especially in peak periods and deficits in the numbers and range of visitor attractions and amenities.

Within the plan it is the aim of Sligo County Council to promote the development of new tourist attractions, particularly with regard to untapped tourism potential. The Council will co-operate with neighbouring local authorities, cross-border bodies and other agencies to promote and establish sustainable tourism initiatives in less-developed tourist destinations, particularly marginalised rural areas, although it is recognised that rural tourism remains a relatively small niche in the overall tourism context. Unlocking and developing the potential of cultural tourism associated with archaeology, landscape, literary and musical heritage and its festivals is another key objective. The existing accommodation stock of hotels and other accommodation providers provides a good platform for supporting the development of the tourism sector in the county.

COUNTY SLIGO HERITAGE PLAN 2016-2020

Tourism has a close relationship with heritage given the strength of Ireland's natural and built heritage. The County Sligo Heritage plan carefully considers the tourism value of the county's heritage assets and sets out a series of recommendations and actions that ensure the sustainable exploitation and preservation of these assets. Relevant actions include:

- ❑ Commission heritage guides to showcase County Sligo's Heritage
- ❑ Liaise with key stakeholders in the care and maintenance of County Sligo's built heritage and public realm
- ❑ Research and develop county heritage trails/themed heritage trails, with a focus on publicly accessible heritage sites and attractions
- ❑ Develop a project to audit heritage assets along Sligo's Wild Atlantic Way

6. CONSULTATIONS

OVERVIEW

Three public consultation meetings were held in Killala, Enniscrone and Ballina. These allowed all interested stakeholders and community organisations to put forward ideas and potential developments to the plan. In all over the course of the 3 public meetings and one further collective feedback meeting over 160 people attended.

Each meeting commenced with a presentation on the purpose and framework of the plan focusing on its rationale and showing examples of proposed developments and the benefits they could bring. Participants were seated in smaller groups and asked to answer a number of rounds of questions.

1. Define your vision for the Moy Estuary in 10 years' time?
2. What are the challenges to be addressed towards achieving this vision?
3. Identify projects (as many as possible) that are needed to achieve that vision
4. Please prioritise your group's top five projects?

One to one consultations were held with a range of public agencies and bodies, these included:

- Mayo County Council
- Sligo County Council
- Inland Fisheries Ireland
- Department of Agriculture
- Department of Environment and Local Government
- Office of Public Works
- The Heritage Council
- Moy Valley Resources
- North Mayo Promotions Office
- Community Groups along the Estuary
- Coillte
- Failte Ireland
- Mayo North East Leader
- Ballina Lions Club
- Ballina Chamber of Commerce
- Beleek Castle
- Hotels in the Region
- Willie Nolan
- Michael Hogan

CONSULTATION RESULTS – PUBLIC CONSULTATIONS

CHALLENGES

The following table summarises the challenges identified at the public meetings. There were a range of challenges identified across the area with some specific to the particular towns.

- ❑ Securing cohesive community buy in and commitment for projects and achieving cross community co-operation
- ❑ A lack of effort by many people by not getting involved in development and community issues
- ❑ Securing funding for projects identified
- ❑ Working at a cross county level can lead to visitor confusion with different facilities and approaches in each county (e.g. provision of electric charging points for cars)
- ❑ To secure land owner goodwill for greenway project
- ❑ The need for a coordinated agency approach and a cross county approach to development.
- ❑ Area needs more resources for marketing and promotion as it was felt not enough resources are made available to adequately penetrate key markets. The work of North Mayo Promotions Office was well recognised and respected having achieved in 2018 an advertising value of over €2m for the region between, TV, print, online and radio.
- ❑ Some issues were raised particularly in Ballina regarding the odours from the water treatment plant at various times, it was felt that the sewage and water treatment plant should be relocated
- ❑ Clean up required along the shore and quay area and restoration of parts of the quay wall
- ❑ The need to ensure cohesive community buy in and cooperation across both counties
- ❑ Lack of visitor accommodation in some areas within the region

PROJECT IDENTIFICATION

Participants were asked to identify as many projects or developments as possible that could potentially be developed within the region. There were no limits as to scope, budget or depth of imagination around the projects. The purpose was to allow free thinking and afterwards the groups explored and examined each project in terms of relevance and feasibility. This exercise gives insight into the ambitions and potential of the region. Table 4 lists the ideas / projects.

Table 4: Project List

Ballina	<ul style="list-style-type: none"> <input type="checkbox"/> Boat tours from the Quay (historical) <input type="checkbox"/> Summer courses for Children <input type="checkbox"/> Fishing activities <input type="checkbox"/> Camping <input type="checkbox"/> Sailing <input type="checkbox"/> Dedicate Jetty for boats of visitors <input type="checkbox"/> Cycling <input type="checkbox"/> River cruises down to estuary regular service that can be booked in advance <input type="checkbox"/> Zip line <input type="checkbox"/> White water rafting <input type="checkbox"/> Water sport centre <input type="checkbox"/> A commercial Tourist day excursion <input type="checkbox"/> Bird watching tours <input type="checkbox"/> Facilities at the Quay for Cyclist, Walkers <input type="checkbox"/> Coffee Shops <input type="checkbox"/> Facilities for people with disability such as hydraulics lifts to enable access to boats <input type="checkbox"/> Salmon life Centre project <input type="checkbox"/> Toilet facilities on the Quay <input type="checkbox"/> Motor homes with parking <input type="checkbox"/> Showers <input type="checkbox"/> Connect Belleek wood to the Quay such as a rope bridge <input type="checkbox"/> Greenway path from Ballina- Enniscrone/ Ballina - Belleek <input type="checkbox"/> Killala -Enniscrone <input type="checkbox"/> Move sewage plant <input type="checkbox"/> Encourage business to take over vacant premises <input type="checkbox"/> More bins, clean up, paint and clean derelict building <input type="checkbox"/> Public transportation between Enniscrone - Ballina - Killala <input type="checkbox"/> Increase access to and developments on Bartragh Island <input type="checkbox"/> Dredge of the river to create river cruises to the estuary <input type="checkbox"/> More interpretation of the wild life that is unique to the area as a natural trail <input type="checkbox"/> Bridge connecting the woods to the Quays <input type="checkbox"/> Tell the story of the ice houses along the river, stories of Enniscrone, Killala, the monasteries and connect all these stories together <input type="checkbox"/> Marina at the Quay <input type="checkbox"/> Sinking of ship in bay for diving <input type="checkbox"/> Promote Wild Atlantic Way through the assets of the region <input type="checkbox"/> Increase accommodation in the area especially in the off season <input type="checkbox"/> Develop and encourage through financial incentives, local community to based tourism business <input type="checkbox"/> Reopen Killala railway line
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Killala	<ul style="list-style-type: none"> <input type="checkbox"/> Visitor accommodation in Killala <input type="checkbox"/> Diving reef in Killala bay <input type="checkbox"/> Killala Quay enhancements including board walkway, on shore facilities and civic spaces <input type="checkbox"/> Glamping facilities / Camping facilities <input type="checkbox"/> Development of Marina <input type="checkbox"/> Sailing Facility in safe Harbour of Killala & Bartragh <input type="checkbox"/> Camper Facilities <input type="checkbox"/> Commercial units to rent <input type="checkbox"/> Quay & Belleek Ballina including a pedestrian bridge at Quay <input type="checkbox"/> Tourist information office <input type="checkbox"/> Family Activities for and things to do for visitors <input type="checkbox"/> Eco Friendly developments across all projects <input type="checkbox"/> Retain water around Killala pier for safe swimming & water activities <input type="checkbox"/> Development of Greenway between Killala, Ballina, Enniscrone <input type="checkbox"/> Development and promotion of the heritage of Killala <input type="checkbox"/> Develop and promote industrial / religious aspect of the heritage of the area <input type="checkbox"/> Souterens in Killala promoted and developed further <input type="checkbox"/> Round Tower Development <input type="checkbox"/> Public transport between town and beaches <input type="checkbox"/> Development of Blueway at back of Bartragh <input type="checkbox"/> Local produce encouraged in local shops and cafes <input type="checkbox"/> Famine History / Archaeology <input type="checkbox"/> Water Bus linking the towns and beaches of the area <input type="checkbox"/> Public Toilets <input type="checkbox"/> Aqua sports Surfing Fishing Shipwrecks Fish Dive <input type="checkbox"/> Zipline Diving Boat Tours <input type="checkbox"/> 1798 Revolution
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Enniscrone	<ul style="list-style-type: none"> <input type="checkbox"/> Development of Greenway <input type="checkbox"/> Blue way and trails, coastal, forest etc <input type="checkbox"/> Historical Tours <input type="checkbox"/> Formation of marketing company for area <input type="checkbox"/> Water sports, diving the reef Killala bay, <input type="checkbox"/> Dive centre ,sea tours <input type="checkbox"/> Tours Sligo / Mayo <input type="checkbox"/> Boat Tours <input type="checkbox"/> Water taxi - Ballina, Bartragh <input type="checkbox"/> Surfing <input type="checkbox"/> Small ship tourism <input type="checkbox"/> Model sport <input type="checkbox"/> Safe guard Salmon fishing <input type="checkbox"/> Summer / Cul Camp for schools <input type="checkbox"/> Potential - rowing clubs <input type="checkbox"/> Bridge over Moy and Quay area <input type="checkbox"/> Expand Folk club <input type="checkbox"/> Brand local Produce of food and crafts <input type="checkbox"/> Pier Development <input type="checkbox"/> Marina including mooring points <input type="checkbox"/> Develop an aquarium <input type="checkbox"/> Tourist information <input type="checkbox"/> Surf School <input type="checkbox"/> River Cleaning <input type="checkbox"/> Conserve area of natural / historical interest <input type="checkbox"/> Development of Macfirbis story and other local stories <input type="checkbox"/> Ballina Salmon Centre <input type="checkbox"/> Development of Festival events <input type="checkbox"/> Upgrade N59 - single recognised route <input type="checkbox"/> Focused PR plan sell area <input type="checkbox"/> Sensitive Development Ballina Quay
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TOP IDEAS

The final part of each consultation asked participants to review their list of projects and ideas and pick their top 5 choices and also identify and set out:

- A short description of the project
- Show what and who needs to be involved to make it happen
- What benefits it would bring to the area

Using this method allowed a level of reality checking and initial cost / benefit to be brought into the thinking. Each small group work on this exercise and a range of differing options were presented. There was clear support for a theme and selection of projects across all groups and all meetings. These were:

1. The unanimous support and recognition of the benefits and impacts that a **Killala – Ballina – Enniscrone Greenway** would bring.

2. The **Quay area of Ballina** to become a central activity hub for cultural, visitor, civic experiences and use this remarkable space to its full potential
3. Maximise the use of the **natural, cultural an heritage resources** of the estuary and river area

Table 5 provides details of the top prioritised projects from the consultation process.

Table 5: Top Ideas from Consultation

Project Description	Description	Benefits
Moy Estuary Greenway	Off road Greenway linking Enniscrone – Ballina – Killala along the estuary.	Provides a significant visitor experience and infrastructural assets. Links up the entire regions and gives reasons to visit and stay. Opens up significant heritage, natural and cultural sites along the route thereby facilitating development of other visitor experiences
Killala Bay Diving Reef	Create an artificial diving reef in Killala bay to promote the areas excellent diving resources and build capability in this niche tourism offering	Diving is a niche sport and the area has excellent diving resources. A plan is developed to create the reef. Diving visitors are high spenders and come all year round. It would give the area a niche but significant market standout
Bridge at Ballina Quays	Develop a pedestrian bridge across the Moy at the Quay area that links the Greenway between Killala, Ballina and Enniscrone	A highly desirable project favoured by many that would provide an added link to Beeleek woods. Significant investment is required to realise this project and is therefore considered a longer term project
Accommodation at Killala	Development of visitor accommodation at Killala	Most favoured option is a small hotel which would benefit the town in many ways. It will require private sector investment and implementation of this plan would give confidence to its viability
Killala Pier	Developments at Killala pier to make the destination more visitor and civic friendly. Include toilets, car park, boardwalk linking back to the town, on and off shore facilities	Provide more usage of the pier, facilitate land and water based visitor activities, increase the attractiveness of the town and encourage more visitation and development of water based experiences like fishing, water sports etc
Ballina Quays	Development of Ballina Quay area into a major civic and visitor space. To incorporate an outdoor events area that can be used for festivals, markets, performances, improved river access and	New multi use visitor experience and centre piece for greenway. Providing platform for many different water based and shore based experience's and new experiences such as museum will attract many visitors. New uses for civic

	facilities on and off shore. Development of Maritime and Heritage museum and visitor centre in existing buildings and café / retail services. The quay will be a centre point along the Greenway	and visitor purposes for quay area and giving new life to the area.
Monasteries of the Moy	Development and opening up of Rosserk and Moyne Abbeys as visitor attractions along the new Greenway. To include access paths, interpretation panels and stories for visitors	Provides new added attractions along the greenway and opens up significant sites to visitors. New attractions that can be promoted and adds to the destinations appeal.
Salmon Life Centre	Development of the Salmon Life Centre in Ballina as per existing plans	Unique visitor experience, capable of drawing large numbers
Local Tourist Trails	Development of local walks and trails in each town showcasing significant sites and stories of cultural and historical interest for visitors	Provides an added experience to visitors to increase dwell time and spend.
Moy Adventures	Development of a series of water based activities such as surfing, SUP, kayaking, diving as experience's for visitors. To be available all over the estuary area where suitable	Provides added attractiveness to the area and increases range of things to see and do, thus increasing visitation.
Salmon Experiences	To develop and operate in conjunction with IFI a range of immersive visitor experiences using the Salmon heritage of the area. To incorporate walks on the Salmon weir, live catching of salmon, visit to a smoke house etc	Provides an added experience to visitors to increase dwell time and spend. Complements the Salmon Life Centre
Remote Working / Grow Remote	Development of a number of remote and co-working places in the towns of the area to facilitate those wishing to start a small enterprise or those who have options to work remotely.	Increases quality of life Encourage entrepreneurship and new business starts Utilises derelict buildings Makes the area more investment appealing
Enniscrone Pier	Developments at Enniscrone pier to make more visitor and civic friendly. Include toilets, car park, boardwalk linking back to the town, on and off shore facilities for water users	Provide more usage of the pier, facilitate land and water based visitor activities, increase the attractiveness of the town and encourage more visitation and development of water based experiences like fishing, water sports etc
Heritage Sites	Develop and open up to visitation the significant	They include: Monasteries, Killala Round Tower, 1798 sites

	heritage sites of the area, thus increasing the range of things to do and see. Integrate these into components of the Greenway Experience	Makes sustainable use of heritage sites and realises their potential to the area
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SUBMISSIONS RECEIVED

As part of the wide ranging public submission, written ideas, submissions and proposals were invited and advertised widely in local media and press. This was not a prescriptive process but allowed for any individual or group to put forward proposals for consideration for the plan.

In total 30 written submissions were made and covered a wide array of ideas and proposals all of which are considered and included within the plan. In summary the submissions included:

- Strong support for the development of the Greenway and its necessity as an asset to drive tourism in the region
- Support for the pedestrian foot bridge over the Moy river
- Increased investment in the towns of Ballina, Killala and Enniscrone in features such as public realm works, enhancement works and the Ballina Quay area
- Various other visitor experiences, product and services all of which are included under actions within the plan.

An online survey was available which sought opinions and ideas for submission to the plan. This received 68 responses from across the area from community organisations and individuals. The feedback via the survey is reflected within this plan. A summary of the data in the survey showed strong favour for:

- The Greenway Development
- Making more use of the areas resources such as the Abbeys, the Moy River, the scenery and habits
- Stronger PR and marketing programmes
- Public realm enhancements across the area especially in the towns of Ballina, Killala and Enniscrone.
- Salmon Life Centre and a focus on Ballina as the Salmon Capital
- A long term objective to have the Moy footbridge constructed.

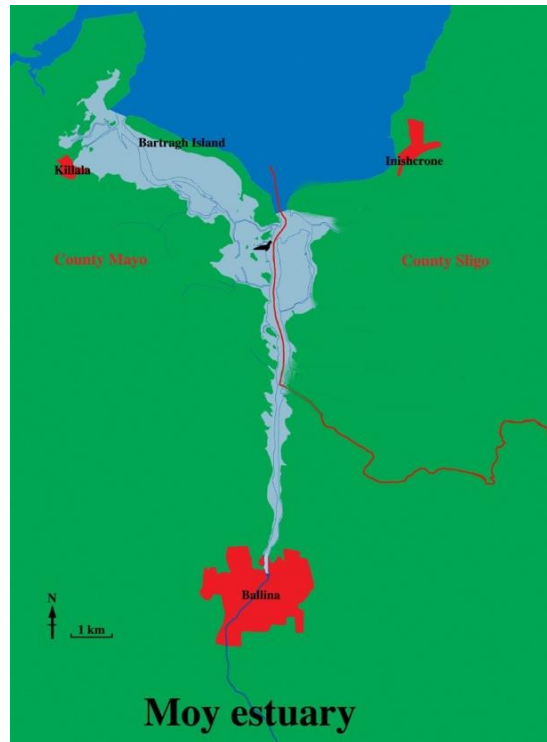
A copy of the questionnaire used is included in the appendices.

7. THE MOY ESTUARY

The Moy estuary lies at the mouth of the River Moy, extending northwards from the north Mayo town of Ballina. The estuary straddles the border between the counties of Sligo and Mayo with approximately 75% of the area of the estuary lying in Co. Mayo. The estuary opens out into Killala bay like a funnel. Part of the estuary on the Co. Mayo side is semi enclosed by Bartragh Island. It is a long and narrow estuary with the town of Ballina at the head and running south to north for approximately 10km. The river enters the sea into Killala Bay near Enniscrone, Co. Sligo.

The Moy Estuary comprises a large area of tidal waters. It teems with sea trout which congregate here to feed on sandeel, sprat and shrimp. Some angling takes place from particular areas on the shore but there are many charter boats available for offshore fishing. A significant feature of the Estuary is the quay area in Ballina. This is narrow and lined with stone walls for about three and a half miles before opening out into a huge basin. Ballina Quay is a discovery point on the Wild Atlantic Way. It is one of the most picturesque parts of Ballina on the eastern side of the Moy. At present, the area comprises of a floating pontoon, light commercial units and parking facilities. The quay area has significant potential with a new floating pontoon at the harbour, Belleek woods across the river, the historic Crete Boom on the river and the picturesque Bartragh Island located down the estuary.

The Moy Estuary connects an impressive array of Irish heritage and culture with the spectacular natural attractions associated with the river Moy. The area is home to Belleek woods, a natural woodland along the banks of the Moy with a myriad of walking and nature trails. The woodlands are home to an abundant range of flora and fauna and a growing population of Irish red squirrel.



Ballina Quay Area

SWOT Analysis of Moy Estuary

Strengths	<ul style="list-style-type: none"> <input type="checkbox"/> Strong domestic market <input type="checkbox"/> Located close to Ireland West Airport <input type="checkbox"/> Depth and breadth of distinctive tourism assets <input type="checkbox"/> Heritage, natural and cultural assets including the Moy River and its Heritage, Belleek Woods and the towns of Ballina, Enniscrone and Killala. <input type="checkbox"/> Strong Local Authority Support from Mayo and Sligo County Councils 	Weaknesses	<ul style="list-style-type: none"> <input type="checkbox"/> High domestic market reliance <input type="checkbox"/> Quality and consistency of industry collaboration <input type="checkbox"/> Lack of shared vision and strategy due to crossing county boundaries <input type="checkbox"/> Limited bed capacity and availability at the peak periods <input type="checkbox"/> Limited year round experiences available <input type="checkbox"/>
Opportunities	<ul style="list-style-type: none"> <input type="checkbox"/> Significant new visitor experiences including a Moy Estuary Greenway, Ballina Quay Development and opening up of heritage sites such as Rosserk Abbey <input type="checkbox"/> Develop greater collaboration at inter county level <input type="checkbox"/> Increase the length of the visitor season through new experiences and offerings 	Threats	<ul style="list-style-type: none"> <input type="checkbox"/> Lack of investment funding <input type="checkbox"/> Brexit <input type="checkbox"/> Impacts of international events outside direct control <input type="checkbox"/>

KEY OPPORTUNITIES

- Natural Resource Base** – The region has a significant natural resource base including its built culture and heritage. These assets have significant potential as visitor experiences.
- Strengthening of community engagement and support for tourism** – There is an opportunity to encourage local communities to further embrace the role as ‘hosts’ of visitors to their area with a view to sharing their special stories and place with others, as well as supporting local employment and the sustainability of local businesses.
- Business participation and engagement in tourism** – A strong, connected network of tourism operators in the region has the potential to enhance professionalism, innovation and business sustainability.
- Increase industry capacity and development** – Given the rapidly changing nature of the tourism industry, it is critical that tourism operators continue to develop their business skills, understanding of markets, and collaboration and leadership skills to leverage the benefits of co-operative efforts.

KEY CHALLENGES

There are a number of challenges that are affecting the capacity of the Moy Estuary area to achieve its full potential. These include:

- ❑ **Limited seasonal dispersal** – There are significant seasonal peaks and troughs throughout the year which reduces returns and creates challenges for some businesses to operate on a year round basis.
- ❑ **Further product development and investment is required to match visitor demand** – To increase visitor numbers and revenue, it is important to improve many of the existing products, services and facilities, develop new experiences and improve infrastructure to meet visitors' expectations and preferences.
- ❑ **Visitor Experience** – Excellence in visitor experience and delivery of that through excellent customer service is a key ingredient to grow tourism revenue and reputation. Greater value should be placed on processes to enhance the overall visitor experience standards not only in businesses but across the entire community

THE GROWTH OPPORTUNITY

Tourism is one of the largest and fastest developing sectors across the world showing high growth and development rates, its activity affects various sectors of economy and communities. The earnings of tourism, job and business creation are the positives. But there can be some negative sides of tourism's economic impacts on local communities. In this context economic and social impacts on the local community depend on how much of the incomes generated by tourists stay within the host communities. For example with all-inclusive packages a large proportion of the fee goes to airlines and hotels many internationally owned and profits do not stay in the host area. Better local value creation can be had when there is a strong network of local businesses providing services such as accommodation and dining, using local produce, labour and materials. This allows for maximum wealth retention in the region. Tourism can lead to over consumption, pollution, and lack of resources thus requiring a sustainable approach in management and development.

The Moy Estuary area has huge strengths in terms of its history, heritage, culture and communities. Within its boundaries is a rich collection of valuable assets which vary from the world famous river Moy to a less well known but diverse and interesting heritage and cultural offering.

Through the implementation of this Plan, the following impacts are forecast over a 6 year period:

- ❑ Average spend per head for domestic and overseas visitors from Failte Ireland Research
- ❑ Visitor bed nights generated based on those bed nights generated by the Great Western Greenway as per the Economic Impact Report carried out by Fitzpatrick & Associates
- ❑ Jobs created is based on tourism employment indicators as provided by Failte Ireland Research

GREENWAY ONLY

- ❑ 25,000 visitors to the Greenway excluding local users in year 1 rising to 47,000 in year 6

- ❑ Generating 30,000 bed nights in year 1, rising to 90,000 in year 6
- ❑ Generating a visitor spend in the region of €1.65m in year 1 rising to €6.095m in year 6
- ❑ Supporting 58 jobs in year 1, increasing to 214 in year 6

TOTAL IMPACT

- ❑ 96,000 visitors in year 1 rising to 145,000 in year 6
- ❑ Generating 42,000 bed nights in year 1, rising to 107,000 in year 6
- ❑ Generating a visitor spend in the region of €5.5m in year 1 rising to €12.5m in year 6
- ❑ Supporting 193 jobs in year 1, increasing to 440 in year 6

Induced economic impacts as a result of the circulation of earnings within the local economy and the purchase of supplies and services is estimated at €7.12m in year 1 rising to €16.3m in year 6.

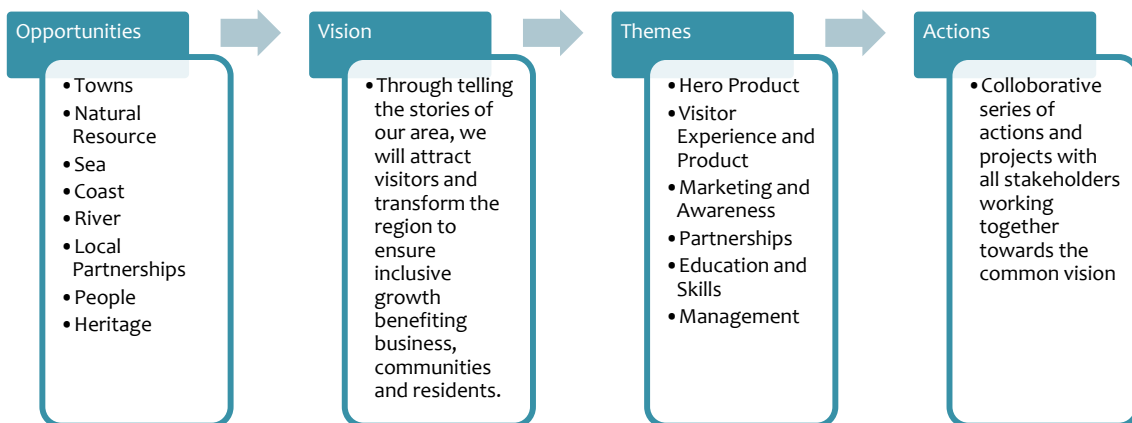
8. THE STRATEGY

STRATEGY FRAMEWORK

The strategy is structured under six pillars as the basis for the developments for the Moy Estuary region over the coming 6 years. Within each pillar is a range of actions that will focus on achieving the overall aims and objectives and guide the work of the stakeholders involved. The six strategic pillars are as follows;

1. Hero Product
2. Visitor Experience and Product
3. Marketing and Awareness
4. Partnerships
5. Education and Skills
6. Management

The strategy seeks to build on the existing opportunities, through a series of inter related themes and actions.



The strategy aligns with a number of underpinning principles as described below:

SUSTAINABILITY

Economic growth must not come at the cost to the environment and / or community sustainability. Environmental impact and sustainability have been key considerations in the development of the plan. Much of the Irish Tourism product is built upon our natural assets such as scenery, natural attractions and heritage and culture. The Wild Atlantic Way of which the study area is a part of is underpinned by the rugged Atlantic coastline and its heritage and culture. It is

essential therefore that new developments and new tourism experiences ensure that they also safeguard and protect these natural assets.

Sustainable tourism is defined as:

"Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities."

Therefore sustainable tourism should support the economic, social and cultural well-being of its host communities. It should help protect and conserve the natural and cultural environment while allowing their enjoyment at the same time. The plan recognises the emphasis placed by national policy on the protection of heritage, natural and cultural assets.

ACCESSIBILITY

Accessible tourism is vital to ensure that all potential visitors regardless of their age, size, disability or abilities can enjoy what the destination has to offer. The provision of accessible tourism products and services creates opportunities for new markets within the tourism sector. It boosts the chances of increasing overall visitor numbers and revenue. It gives the destination a market standout and wider recognition as an accessible and friendly place to go. All developments under this plan will ensure full consideration is given to accessibility for all.

BUILDING CONSUMER EXPERIENCES

Failte Ireland carried out significant consumer research to inform the development of their regional brand propositions such as the Wild Atlantic Way and Irelands Ancient East.

Modern consumers want to engage in immersive experiences, be active participants and are seeking to learn from the places that they visit. They want to interact with the local people, the culture and the traditions. They wish to experience the local provenance of food and drink of a region. They are time poor and inundated with lots of information about destinations. Therefore the experience needs to be clear and connect with the visitor and above all easy to find and book.

Having a variety, depth and breadth of things to do are important in consumer purchase decisions. Marketing collateral needs to information about accommodation, things to do, see and partake in and how to get to and from the region. It needs to be clear and easily understandable for the consumer.

Food is very important to visitors. It is now considered part of the overall tourism experience with some market segments more particularly the "Culturally Curious" and "Social Energisers". The destination should portray its food as part of the core visitor experience.

Outdoor adventure and activity tourism such as walking and cycling have been identified as particular growth sectors worldwide. This has particular relevance in counties of Mayo and Sligo, who have invested strongly in walking and cycling infrastructure and successfully integrated this product to create engaging experiences for visitors that include food, heritage, culture and outdoor activities. Greenways have proven to be an excellent method of engaging visitors to stay longer and spend more in a region.

Consumers are seeking to experience and engage in a destinations built and natural heritage. Built heritage consists of all aspects of the man-made historic environment such as houses, commercial buildings, gardens, places of worship, cemeteries, monuments and built infrastructure. The Moy Estuary region has an abundance of built heritage assets that include Monasteries, Ballina Quays, the Salmon Weir and many historic buildings. By harnessing these and linking them through a destination wide greenway creates a range of visitor experiences to interest all tastes.

PARTNERSHIPS

Working Partnerships are essential as without them, implementation of activities as planned cannot happen. This will require a working model between the private / public and community sectors. Main partners will include the local authorities, Failte Ireland, Private Sector Businesses and the Community Sector.

Mayo and Sligo County Councils and North Mayo Promotions Office have key roles to play in building product and experiences. New and improved experiences will be based on research that underpins a demand across consumer markets and where the region has a leading capability to host and deliver such experiences.

VISION AND VALUES

From the consultations it has been possible to come up with an overall vision for the Moy Estuary area. The Vision is summed up as:

A leading and diverse economy, built on the creativity and enterprise of the people, one that improves the quality of life for all who live and work there and by telling the stories of the area, develop and promote the Moy Estuary region, attract visitors and transform the region to ensure inclusive growth benefiting business, communities and residents.

Translating this vision into reality and actions mean that the area is to grow and develop to become one with:

Active levels of economic participation and inclusion with sustainable and dynamic urban and rural environments. The actions required to achieve this vision encompass:

- Building on the region's current strengths
- Improving areas of average or poor performance
- Capitalising on the distinctive opportunities

To achieve the vision the plan will be implemented across a number of shared values.

Collaboration and Engagement - Fostering collaboration and engagement with, and between, stakeholders is critical to the development of a healthy, cohesive and responsible tourism industry that delivers outstanding visitor experiences.

Taking Responsibility - Understanding the impacts of activities, upon other people and the environment. Stakeholders take responsibility for their behaviours, actions and achievements when:

- Working with other stakeholders
- Providing commercial services
- Communicating to visitors
- Making decisions that impact upon the environment.

Leadership - Leadership by way of facilitation of discussion, acknowledging the different needs, values and drivers of stakeholders and incorporating a democratic and inclusive approach to decision making.

Financial well-being - Being commercially viable as an industry and understanding that the profitability of local businesses is essential to the sustainability of tourism, employment and quality of life for residents

Flexibility and Adaptability - To survive in a comparatively unpredictable, rapidly changing industry with a diverse range of stakeholders, requires a collective willingness to lead change, and be responsive to change.

Authenticity and Realism – To build successful working partnership, stakeholders need to be authentic in the way they relate to others and have realistic expectations.

Inclusiveness - Stakeholders are conscious of, include and respond to the needs of a diverse range of stakeholders and visitors and their cultures to the region.

Agents for Change - Collective stakeholder leadership roles provide the opportunity to work towards improving the social, economic, cultural and environmental health of the area.

Responsible Hosts - All stakeholders value the environment and culture of the area and its destinations and are proud to share this with visitors.

Sustainability - With growth comes responsibility and the strategy will seek to ensure that the recommended actions address economic, social and environmental sustainability issues.

Quality - The Moy Estuary area should aspire to provide a world-class visitor experience at all levels. This needs to be both managed and marketed. Critical to this will be an overarching Destination Management Plan that deals with the whole of the Visitor Experience.

Smarter - Making it Happen - the strategy identifies ways of providing targeted and collective improvement opportunities across the area and within the private and community sectors. It allows responsive action from private and public sector stakeholders through the agreed plan and to have greater partnership working at local level.

STRATEGIC THEMES

This part sets out the six strategic goals. For each goal there is an initial context section which provides some background to the issues, highlights priority areas where focus is needed and how this will be achieved.

Table 6 sets out the six strategic themes and what each one will involve:

Table 6: Strategic Themes

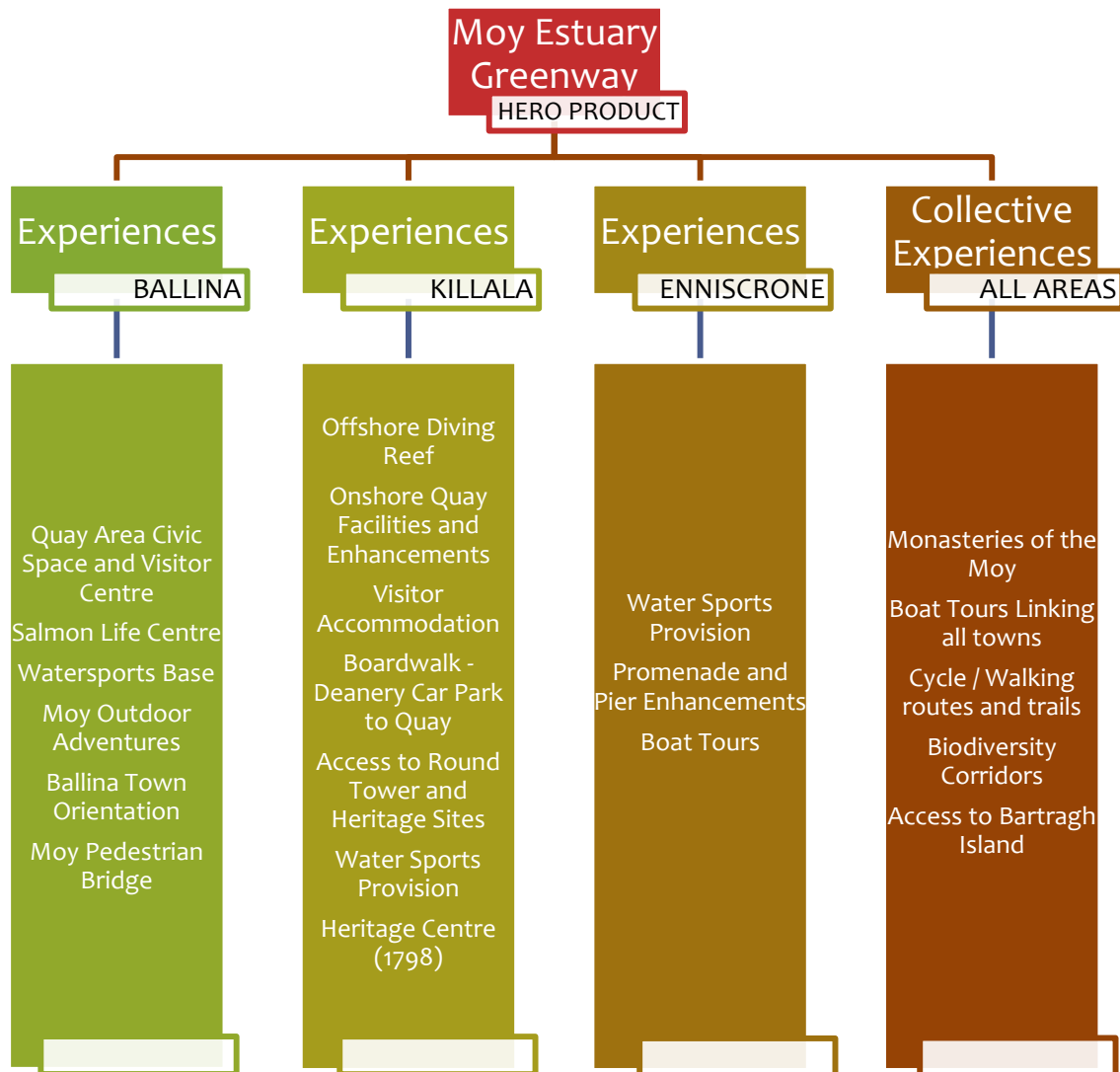
Strategic Pillar	Strategic Goal
Hero Product	Create a signature and hero product and experience for the destination that will make it stand out in the market place at national and international level
Visitor Experience and Product	Strengthen and develop a range of complementary visitor experiences contributing to a destination with competitive differentiation This includes the definition of more ambitious and longer range project which would significantly benefit the area and give it a unique destination standout.
Marketing and Awareness	Develop and invest in marketing, communications and sales strategies that resonate with consumers and drive business to the region
Partnerships	Put in place working partnerships to deliver on the strategy between private / public / community sectors.
Implementation	Foster and increase stakeholder and industry collaboration for the benefit of the region
Education and Skills	Increase and grow the capacity of industry to create and promote experiences, deliver exceptional customer service and maintain a fully sustainable destination

THEME 1 - HERO PRODUCT

The plan focusses on developing a “Hero Experience” that has the potential to activate the region’s identity, driving international and domestic tourism through developing a compelling and must see destination. This is not about building new attractions – but about opening up and making accessible much of what is already there, an eclectic mix of heritage, history, culture and landscape. Such iconic product needs to be able to cut through and appeal to the target markets and audiences.

Underpinning this and supplementing the iconic hook will be the entire range of other experiences and itineraries which can be developed for both domestic and international markets. Packaged with compelling narratives, the region can deliver exciting and distinctive experiences for its target markets.

Figure 3: Collaborative Develop and Growth Platform



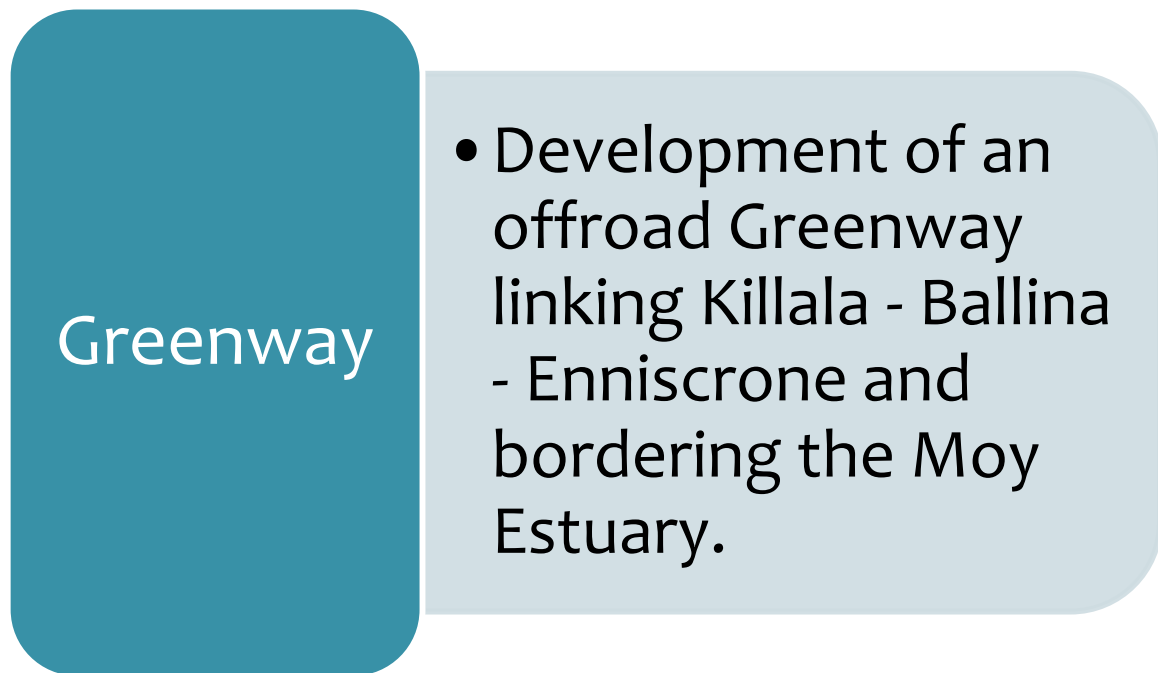
The River Moy is the singular most important element of the tourism experience for the region. The river offers a fascinating array of experiences from angling, watersports, and the capacity to act as a vein linking the towns of Killala, Ballina and Enniscrone, thus linking the individual experiences and attributes of these places. The river has the potential to transform the visitor experience of the area and greatly increase the scope of things to do, see and enjoy.

The consensus through all consultations for a Hero Theme is the **Development of an off road walking and cycling Greenway linking Killala – Ballina – Enniscrone and opening up the river and its coastal attributes and heritage to all.**

The Greenway will consist of a mostly traffic free greenway linking Killala – Ballina – Enniscrone. It will travel in so far as possible off road along the western and eastern sides of the Moy Estuary and link into a number of key visitor experiences along the river. It will link the 3 towns via an off road and modern walking and cycling infrastructure. Future developments may include a new

pedestrian bridge across the River Moy at the quay area which will eliminate mixing with traffic in and around Ballina.

Figure 4: Hero Product



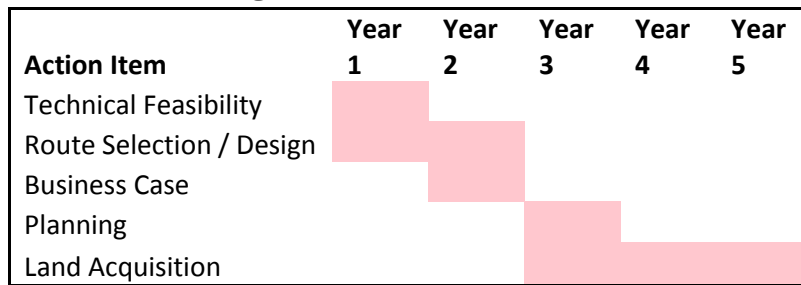
ACTIONS

The Proposed Greenway linking Enniscrone to Ballina to Killala is approximately 25km in total, using a combination of existing roadway and paths and new construction on lands along the estuary above the high tide marker. This is a significant infrastructural project that requires much planning and development and cooperation across county councils, landowners and other public bodies. Key actions are:

- ❑ Feasibility – Assessment of technical feasibility and route option development. Complete indicative costs for project
- ❑ Route Selection and Design – Selection of most suitable route having regard to project objectives, construction ease and costs
- ❑ Business Case – Develop a business case to support investment
- ❑ Land Acquisition – work with landowners to secure permission for access to land for the greenway
- ❑ Planning – Undertake planning process and all necessary reports, studies and surveys
- ❑ Construction – Construction of greenway including all signage orientation
- ❑ Staged developments – In most cases greenways are constructed on a phased basis as investment is available and phases of the project are ready to proceed. This will likely be the case in this project.

In terms of time frame the Greenway will be viewed as a long term project with an initial phase of 5 years. Within this period, the project should at least progress to a stage where a first stage is ready for construction. Figure 5: presents an outline time scale.

Figure 5: Indicative Timescale



COSTS

Final Costs will be determined by final design, length, complexity of construction and costs at the time of procurement. Therefore it is not possible to present a fully accurate cost at this time. An indicative cost based on high quality greenway construction from other projects in Ireland is presented in table 7:

Table 7: Indicative Costs

Item		
Construction Cost per km of €350,000		
Construction of 25 km	€	8,750,000
Engineering Planning & Design Fees - 10%	€	875,000
Total Cost	€	9,625,000

The above excludes the costs of any potential land acquisition.

THEME 2 - VISITOR EXPERIENCE AND PRODUCT

Develop a range of complementary visitor experiences contributing to a destination with competitive differentiation

The quality and distinctiveness of visitor experiences is the key to winning business. While the region has some outstanding experiences, most notable being the famous River Moy for its salmon fishing, it does not in general offer a truly differentiated and compelling visitor experience for a wide range of target markets.

Smaller sub county regions will not gain sufficient traction in international market places due to the crowded nature of the market. They need to align strongly with national brand identities and strategies and in the case of the Moy Estuary, this is the Wild Atlantic Way. Fortunately the region has the raw product of natural, cultural and heritage resources that the Wild Atlantic Way is built upon. Therefore the development of future visitor experiences must associate closely with the market proposition of the Wild Atlantic Way. This will set the framework for product and visitor experience development within the plan. It sets out to build on current strengths and attributes and with a focus on serving the current and future needs of visitors and locals alike. A key component will be on projects that have the capacity to lengthen the tourist season and create year round activity.

Figure 6: Visitor Experience and Product Development Framework



VISITOR EXPERIENCE AND PRODUCT ACTIONS

BALLINA QUAY AREA

Ballina Quay Area				
No.	Action Title	Action Description	Stakeholders	Indicative Cost
1	Quay Area Civic Space	<p>Redevelopment of the large site at Ballina Quays into a civic space with features to include:</p> <ul style="list-style-type: none"> • Outdoor performance space • Seating and public realm landscaping • Picnic area • Small public toilets and changing area for water sports • Improved river access for sports and boating • Static visitor information point and orientation signage 	<p>Mayo County Council Moy Valley Resources Quay Area Residents Association Ballina Lions Club Ballina Chamber of Commerce Ballina Boat Club Inland Fisheries Ireland Ballina Tidy Towns Ballina Community Clean Up</p>	€750,000
2	Industrial Heritage Visitor Centre	<p>Redevelop part or all of the Kennedy Glasgow House to a new Visitor centre showing in an immersive manner the Industrial Heritage of Ballina, Killala and Enniscrone. To include:</p> <ul style="list-style-type: none"> • Ballina Port and its role • History of Ballina and surrounding areas • Impact of the Moy on the development of the area 	<p>Moy Valley Resources Mayo Co Co Failte Ireland Mayo North Promotions Office</p>	€1,200,000
3	Public Realm Works	<p>Complementing public realm works along the Quay area as required to include visual improvements from Quay road, signage and improved entrance and exit</p>	<p>Mayo Co Co Moy Valley Resources Ballina Tidy Towns Ballina Community Clean Up</p>	€100,000

BALLINA TOWN

Ballina is a town with a host of attractive features for visitors, but a town not necessarily known as a leading tourism town. Unlike towns like Westport or Kilkenny which are well known for particular experiences, Ballina does not have a significant stand out feature except for its salmon angling, which is seasonal and very niche. With investments in recent years and planned investments in the new Salmon Life Centre, The Jackie Clarke Collection, Mary Robinson Centre, the Innovation Quarter at the Military Barracks, this gives very real new experiences and identity to Ballina. The town must continually develop its profile and one rich in heritage and culture and distinguish itself from other towns. Therefore a range of supplementary actions are projected that will support this differentiation and development of unique visitor experiences.

Ballina Town				
No.	Action Title	Action Description	Stakeholders	Indicative Cost
1	Calendar of Events	<p>Ensure that there is consistently available weekly activity.</p> <p>Create an annual calendar of events that is frequently updated and widely available. To include all festivals in the region, entertainment, events, sporting events etc</p> <p>Ensure at least one activity that everyone within Ballina (and outside) can remember easily when verbally cross selling e.g. a guided walk of the town 3 every Saturday morning at 11.00am.</p> <p>This activity is in place since 2015, operated by North Mayo Promotions Office</p>	<p>Local Community Organisations</p> <p>Local Businesses</p> <p>Mayo North Promotions Office</p> <p>Moy Valley Resources</p> <p>Plan Manager</p>	€5,000 per annum
2	Ballina Town Orientation	<p>Develop a branded visitor orientation plan for Ballina. The branding and theme used to be consistent with branding across the Moy Estuary region. To include signage, information points and wayfinding to and from attractions and experiences</p>	<p>Failte Ireland</p> <p>Mayo County Council</p> <p>Ballina Chamber of Commerce</p> <p>Ballina Lions Club</p> <p>Local Community Organisations</p>	€100,000

3	Develop new Cross Selling Offers	<p>Bring together all members of the tourism industry to initiate the process of creating cross selling offers on an annual basis. This will be a 3 hour session on:</p> <ul style="list-style-type: none"> • Key market segments being targeted and prompt offers that attract each segment and their needs • Deliver a speed dating networking scenario with all businesses rotating every 10 minutes to encourage networking and the development of cross selling offers • Have a template to record possible cross and joint selling offers that can be produced between businesses 	<p>Failte Ireland Moy Valley Resources Ballina Chamber of Commerce Plan Manager Mayo North Promotions Office</p>	€1,000
4	Enhance seasonal and regional appeal of the Town	<p>Devise a dedicated plan to enhance seasonal and regional appeal of the town and surrounding region. This involves businesses working together to develop experiences that can be enjoyed outside of the main season. It can then be used on all marketing collateral, the events calendar and by individual businesses in marketing and sales efforts</p>	<p>Plan Manager Business and Commercial Sector Mayo North Promotions Office</p>	
5	Food Experiences	<p>Strengthen Ballina's food and drink offering as core element of the tourism proposition.</p> <p>Utilise the strong food heritage around the Moy Salmon and locally produced agri food products to develop a range of tasting experiences and other specialities that will supplement the local culture and heritage led offers. Examples to consider:</p> <ul style="list-style-type: none"> • Moy Salmon Platter • Ballina Gourmet Picnic 	<p>Plan Manager Inland Fisheries Ireland Local Food Businesses Mayo North Promotions Office</p>	

5	Experience Framework	Develop and define the experiences using Fáilte Ireland's National Experience Development Framework, which will result in a compelling narrative that maximise the opportunity from the Wild Atlantic Way	Failte Ireland Local Businesses Plan Manager Mayo North Promotions Office	
6	Moy Salmon Experiences	In conjunction with the proposed new Salmon Life Centre and Inland Fisheries Ireland, develop a live and interactive visitor experience involving guided tours to the Ballina Salmon Weir and old Salmon Weir facilities	Inland Fisheries Ireland Local Businesses Plan Manager Mayo North Promotions Office	€5,000
7	Professional Content Writer	Engage of a professional content writer to ensure that Ballina Town experiences are consistent with all that Ballina and the Moy Estuary Region has to offer and with the Wild Atlantic Way. Ensure that similar wording and SEO content that will be picked up on by the visitor	Plan Manager Local Businesses Contracted Content Writer Mayo North Promotions Office	€6,000
8	Weekly Themes	Develop themes between at least 5 businesses that are available on quieter days, for example: Seafood Wednesdays Activity Trail Fridays Heritage Tuesdays See similar at www.burren.ie . This would be available on all websites promoting the area and on the calendar of events	Plan Manager Local Businesses Mayo North Promotions Office	
9	Monasteries of the Moy	Develop of project as proposed previously	Mayo Co Co OPW Mayo North Promotions Office	€400,000
10	Salmon Life Centre	Develop of Salmon Life Centre at Ballina as proposed	Mayo Co Co Inland Fisheries Ireland Failte Ireland Mayo North Promotions Office	€1,500,000

KILLALA

Killala is a quiet coastal village at the mouth of the Moy Estuary, but once was a busy port town. The town has an important place in Ireland's history as the place where the French first halted when they invaded in 1798. The town has a very rich collection of built heritage assets that include: a 25 meter 12th century round tower, which is built of limestone, a cathedral erected in 1670, its graveyard contains a 9th century souterrain with many chambers. Abbeys built along the river Moy include Moyne, Rosserk and Rathfran.

Killala				
No.	Action Title	Action Description	Stakeholders	Indicative Cost
1	Offshore Diving Reef	The waters of the Moy Estuary are some of the best for diving in the country. This flagship action is the creation of an artificial diving reef off the coast at Killala using a decommissioned ship. Positioning Killala as a specialist diving location will attract new high spending visitors on a year round basis to the village and wider area	Killala Community Council Enniscrone Community Council Mayo County Council Failte Ireland Plan Manager Mayo North Promotions Office	€500,000
2	Developments at Pier Area	Enhance Killala pier and harbour to improve facilities for those using the water such as better access points, onshore facilities such as toilets, changing areas, seating areas. To make the pier area more attractive as a place to visit and a feature of the town	Mayo County Council Local Businesses Community Plan Manager	€200,000
3	Increased Access to Heritage Sites	Improve access to the important heritage sites in the area, including the Round, Tower, Souterrain, Moyne and Rosserk Abbey, improve access for visitors without damaging the sites. This will include new information signage for visitors, managed opening times, guided tours. Some of these access developments will be part of the Killala – Ballina – Enniscrone Greenway experience	Mayo County Council Killala Community Council Plan Manager Mayo North Promotions Office	

4	Family Friendly Experiences	Develop a series of family friendly experiences that can be enjoyed in the area. Using collaboration across businesses inside and outside the area. Develop 5 saleable offers with a focus on outdoor activities and watersports	Local Businesses Killala Community Council Plan Manager Mayo North Promotions Office	
5	Increase Local Accommodation Base	Working with Failte Ireland and Mayo County Council, endeavour to attract private investment to develop new visitor accommodation at Killala. Support efforts through visitor monitoring, visitor count and surveys. Examine feasibility of visitor accommodation required, e.g. Hotel, Glamping, Self-Catering etc	Plan Manager Failte Ireland	€5,000
6	Killala Boardwalk	Develop a boardwalk linking the Deanery Car Park to the Old Quay area	Mayo County Council Plan Manager Killala Community Council	€40,000
7	Killala Visitor Centre	Using an existing public building such as the Community Centre, create a small visitor centre that will furnish visitors with all local area information and experiences and have a small interpretation of Killala history and heritage	Killala Community Council Plan Manager Failte Ireland Mayo North Promotions Office	€60,000
8	Support the Greenway Development	Support the development of the Killala – Ballina – Enniscrone Greenway project	All Stakeholders	
9	Water Based Activities	In collaboration with Ballina and Enniscrone and the tourism Industry support the development of water based enterprises and experiences. This to include water sports and a water bus tour linking Killala to Enniscrone and Ballina	All Stakeholders Mayo North Promotions Office	
10	Grow Remote Region Promotion	Promote the region as a place for remote working both locally and nationally across industries where remote working is possible. Work with community and statutory stakeholders to develop and implement actions that will restore	Plan Manager Mayo County Council Killala Community Council Private Sector	

		derelict and underused sites and buildings as remote high quality workspace		
11	Local Heritage Trails and Stories	Develop a series of local trails of interest for visitors and locals around the stories of the Industrial / Religious and Cultural Heritage of the area	OPW Mayo Co Co Community Organisations Mayo North Promotions Office	
12	Public Realm Works	Developing and implementing a plan of public realm works in Killala	Mayo Co Co Moy Valley Resources Killala Community Council	

ENNISCRONE

Enniscrone is a well known family holiday seaside resorts. Its 5km stretch of beach is surrounded by dunes and offers a magnificent vista in all directions. Enniscrone offers many visitor experiences and attractions. They include a family a supervised playground and amusement parks, an 18 hole championship golf course, surfing, sea angling, excellent range of food and drink choices, excellent range of accommodation from Hotels, guesthouses, caravan and camping facilities. It is home to the famous cliff house sea weed baths, established in 1912 and situated where visitors can enjoy full treatment comprising of Steam and Seaweed Bath and Sea Water Showers. There are many archaeological and historical sites located in the area.

Enniscrone				
No.	Action Title	Action Description	Stakeholders	Indicative Cost
1	Centre for Water sports	Enniscrone has developed a good reputation for water sports, particularly surfing. Given its reputation as a family resort the further development of water sports to include such items as SUP and wind surfing for example would add greatly to the appeal of the area and help to widen the visitor season. This plan will support private and public sector investment in this area. Particular actions include investment in onshore facilities such as changing and toilet facilities, meeting points and	Enniscrone Community Council Sligo County Council Plan Manager Mayo North Promotions Office	€300,000

		promenade based public realm improvements to make it more attractive and enticing for water sport development		
2	Support the Greenway Development	Support the development of the Killala – Ballina – Enniscrone Greenway project	All Stakeholders	
3	Water Based Activities	In collaboration with Ballina and Enniscrone and the Industry support the development of water based enterprises and experiences. This to include water sports and a water bus tour linking Killala to Enniscrone and Ballina	All Stakeholders Mayo North Promotions Office	
4	Local Visitor and Information Centre	Develop a small local visitor centre that will furnish visitors with all local area information and experiences and have a small interpretation of Enniscrone history and heritage	Enniscrone Community Council Plan Manager Failte Ireland Mayo North Promotions Office	€60,000
5	Pier and Promenade Development	In conjunction with Sligo County Council to provide public realm enhancements and improvements to the Pier and Promenade area at Enniscrone	Enniscrone Community Council Plan Manager Failte Ireland	
6	Family Adventure Camps	Develop a series of weekly long activity camps for families to enhance Enniscrone and the region as a holiday destination. Focus on activities including Water sports, cycling, sports, surfing, golf.	Local Businesses Plan Manager Mayo North Promotions Office	
7	Local Heritage Trails and Stories	Develop a suite of local history and interesting stories for visitors to enjoy	Mayo North Promotions Office All Stakeholders	

COSTS

Table 8 gives a programme of indicative costs and times lines for the above projects.

Table 8: Visitor Experience Costs

Visitor Experience and Product Development	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Ballina Quay Area Civic Space		100,000	350,000	300,000		750,000
Industrial Heritage Visitor Centre at Ballina Quay			100,000	1,000,000	100,000	1,200,000
Quay Area Public Realm Works	50,000		50,000			100,000
Develop and Maintain Area Events Calendar	5,000	5,000	5,000	5,000	5,000	25,000
Orientation programme for Ballina		50,000	50,000			100,000
Development of Moy Salmon Experiences		50,000				50,000
Web based content creation	6,000			3,000		9,000
Salmon Life Centre Visitor Centre			600,000	600,000		1,200,000
Monasteries of the Moy		200,000	200,000			400,000
Offshore Diving Reef Killala		300,000	400,000	100,000		800,000
Peir Area Developments at Kilala		100,000	100,000			200,000
Killala Boardwalk		40,000				40,000
Killala Visitor and Information Centre	30,000	30,000				60,000
Water Sports Centre at Enniscrone		150,000	150,000			300,000
Enniscrone Visitor and Information Centre	30,000	30,000				60,000
Enniscrone Pier and Promenade Development		150,000				150,000
TOTAL	121,000	1,205,000	2,005,000	2,008,000	105,000	5,444,000

THEME 3 – MARKETING AND AWARENESS

The aim of this strategic theme is to invest in marketing, sales and publicity activities to create wider awareness and knowledge of the destination among national and international markets. All stakeholders will adopt a collaborative approach to marketing coupled with cross selling

Develop and invest in marketing and promotions activities in partnership with stakeholders to support awareness of the destination and increase sales and visits

As the strategy proposes significant investment in experiences, product and infrastructure and in developing of the cross industry partnerships to deliver them, marketing and publicity actions will bring this message to the consumer and convince them to purchase it.

As the destination will compete in a highly competitive global marketplace and recognising that there are finite resources, it is important that all actions are clear in the proposition being sold, is relevant and appeal to target markets and ensure that experiences are easy to purchase and access.

The efforts will require co-operation between all stakeholders, public and private to ensure consistent messaging and branding. All actions must align to and work within the Wild Atlantic Way brand. This is the foremost internationally recognised brand that the Moy Estuary region resides within. It is important that the Moy Estuary region continues to differentiate itself from other destinations along the Wild Atlantic Way and create its own unique and competitive position. The investments in product and experiences will support this differentiation.

The work of North Mayo Promotions Office, Mayo and Sligo County Councils in their respective marketing and promotions over the years need to be acknowledged. North Mayo Promotions Office provide a region wide marketing and promotions campaign which includes Enniscrone on an annual basis delivered on a skeleton budget and resources. Their largest challenge is acquiring sufficient resourcing for campaigns, therefore budgets as set out in this plan should be in addition to the resources already in place through North Mayo Promotions Office. It is also important to note that many of the actions and activities proposed in this section are already carried out by partners such as North Mayo Promotions Office and also by the private sector and Local Authorities. The inclusion here is to ensure that a comprehensive marketing plan is part of this plan and to emphasise the need for additional resources towards this important activity.

Significant resources under the plan are focused on development of visitor experiences and putting in place a robust governance arrangement. It is equally as important that adequate resources are targeted towards developing the Moy Estuary brand, gaining traction in the market place and ultimately turning this into increased visitation and revenue.

The core of the marketing actions will revolve around:

- ❑ Working in partnership with stakeholders such as Mayo and Sligo County Councils, Fáilte Ireland and Tourism Ireland in supporting and adding to their marketing and sales campaigns

- ❑ Developing a unique destination brand and proposition that will give the Moy Estuary area market standout
- ❑ Working with the businesses and communities within the region to ensure a common understanding of the brand and the marketing endeavours and ensure their contribution and buy in
- ❑ Supporting and developing marketing programmes and actions including online, offline and direct marketing and sales actions.

BRANDING

It is essential that the branding and presentation of the Moy Estuary region conforms and aligns to the Wild Atlantic Way brand first and foremost. Underneath this it will be important for the region to develop its own unique position and offering within the Wild Atlantic Way brand. By building the experiences and positioning them in the context of Wild Atlantic Way, the region will be best placed to present its offerings in the strongest manner to its target markets.

Specific actions for brand and communications are:

- ❑ Alignment of all experiences and offerings with the brand and character of the Wild Atlantic Way
- ❑ All stakeholders including public and private are clear on the target markets and how to communicate within a domestic and international context
- ❑ Optimise the digital presence of the Moy Estuary experiences in national and international marketplaces
- ❑ The offerings and experiences are showcased and sold to tour operators through increased presence in trade fairs and sales missions.
- ❑ Developing a Business to Business network in the region so facilitate joint promotions and experiences for the marketplace
- ❑ Put in place an annual programme of PR and publicity for the region in cooperation with stakeholders
- ❑ Develop and present offerings to Tourism Ireland for utilisation in their overseas marketing and communication campaigns

KEY COMPONENTS OF MARKETING

Key components that the overall marketing and communications strategy will always have to conform to are:

- ❑ Coherence of messaging and presentation of marketing and advertising material by all stakeholders.
- ❑ All stakeholders are clear about and focused on the key target segments - Ensure they understand how to communicate to consumers both on a domestic and international basis.
- ❑ A clear Moy Estuary message is framed within the context of the Wild Atlantic Way brand.
- ❑ Optimise and keep current the digital presence of the Moy Estuary across all digital channels
- ❑ Carry out annual visitor research on the appeal of the Moy Estuary message and use this to improve and build on future activities

- ❑ Work on a collaborative basis to ensure that the Moy Estuary experiences are presented and sold on a continual basis to tour operators.
- ❑ Stronger cooperation between public and private sector bodies marketing the counties of Mayo and Sligo. This is to ensure a joint and seamless campaign and message is delivered to the market place.
- ❑ Ensure that all experiences can be easily used by Tourism Ireland for their marketing collateral in overseas markets.
- ❑ A region wide agreed approach towards dealing with complaints and adverse publicity

Destination Brand Development				
No.	Action Title	Action Description	Stakeholders	Indicative Cost
1	New Destination Visual Identity	Develop a destination brand including logo and strapline and photo bank for use in marketing and promotions Develop brand and usage guidelines	All Stakeholders Lead by Plan Manager North Mayo Promotions Office	€10,000
2	Template Marketing Collateral	Develop new templates of marketing material to use including brochures, flyers, email templates, social media layouts and headers and all other related communication material. Ensuring all adheres to new destination brand	All Stakeholders Lead by Plan Manager North Mayo Promotions Office	€5,000
3	Communicate Brand Strategy	Communicate and educate all stakeholders in all aspects of use of the brand and strategy. Using 3 workshops and making available brand support guidelines	Plan Manager North Mayo Promotions Office	€2,500

Digital and Social Media				
No.	Action Title	Action Description	Stakeholders	6,000
1	Annual Social Media Plan	Develop an annual social media plan that will framework the social media activities for the coming year. It will link to the calendar of events, identify how information will be sourced for the social media, outline tactics, set performance benchmarks and provide for training sessions for local industry to allow them engage and support the social media campaign. Implement social media advertising campaigns to motivate visitors to arrive in the region particularly during quieter times of the week and on different days of the week.	Plan Manager All other stakeholders North Mayo Promotions Office	€10,000

		It is noted that a large social media following is in place already with North Mayo Promotions Office with a following in excess of 30,000		
2	Appointment of Digital Media Resource	In line with the Social media plan, identify and appoint a resource to ensure the plan is implemented	Plan Manager North Mayo Promotions Office	€12,000
3	Moy Estuary Website	<p>Evaluate the need for a new destination focused website or linking in with already existing websites such as (North Mayo Tourism or Sligo Tourism for example) The following key information to be included on the web presence:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Moy Estuary Experiences (all of the newly developed and existing experiences and offers) <input type="checkbox"/> Prominent special discounted offers that occur at less busier times of the week <input type="checkbox"/> Planning your visit (a map of where Moy Estuary is located, things to do and detailed transport options) <input type="checkbox"/> Online booking facility if appropriate <input type="checkbox"/> Upcoming festivals and events <input type="checkbox"/> PR and Media endorsement <input type="checkbox"/> Profiles of Moy Estuary experience providers <input type="checkbox"/> Lots of photo and imagery <input type="checkbox"/> Professional written content pieces to complement the Experiences. 	Plan Manager Moy Valley Resources Failte Ireland Sligo County Council Mayo County Council North Mayo Promotions Office	€10,000
4	Website Updates	<p>Update and maintain Website presence, 10 hours per month. On going work should include:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Internationalisation of the website to include the translated offers 	Plan Manager Digital and Web Provider North Mayo Promotions Office	€3,000

		<ul style="list-style-type: none"> <input type="checkbox"/> Continue to update with new photography, videos, experience provider profiles and offers <input type="checkbox"/> Updating of media tab <input type="checkbox"/> Wild Atlantic Way presence <input type="checkbox"/> New events and festivals <input type="checkbox"/> SEO 		
5	Align with Wild Atlantic Way	The Wild Atlantic Way and key messaging associated with the brand to be on the home page of the website and digital media presence.	Plan Manager North Mayo Promotions Office	

Marketing and Sales Actions				
No.	Action Title	Action Description	Stakeholders	Indicative Cost
1	Annual Moy Estuary Visitor Flyer	Design and print of flyers / posters with information on Moy Estuary region, all experiences and offers, events and website / digital information details. This to be a visual and compelling flyer which can be uploaded to social media, community and businesses websites and printed for circulation. It will be updated annually	Plan Manager All other stakeholders North Mayo Promotions Office	€3,000 per annum
2	PR Plan	Appoint a PR expert and agreement of a terms of reference and framework for plan. All tourism stakeholders feed into the PR plan. The plan will set out: <ul style="list-style-type: none"> <input type="checkbox"/> A series of onsite press and travel writer visits <input type="checkbox"/> Write ups of the experiences for circulation to the travel press and papers <input type="checkbox"/> A signature piece of PR each month <input type="checkbox"/> Liaison with Tourism Ireland, Failte Ireland, Sligo and Mayo Tourism bodies 	Plan Manager PR Company North Mayo Promotions Office	€3,000

		<ul style="list-style-type: none"> <input type="checkbox"/> New and innovative features of products and experiences <input type="checkbox"/> Building a contact database 		
3	Implementation of PR Plan	Implement the actions in the PR Plan on annual basis	Plan Manager PR Company North Mayo Promotions Office	€7,500
4	Failte Ireland and Tourism Ireland listings	Ensure that all business and experience providers have an up to date listing on Failte Ireland and Tourism Ireland consumer websites	Plan Manager North Mayo Promotions Office	
5	Domestic Market Publicity	Liaise with Fáilte Ireland's Publicity Manager: Submit continually offers for inclusion on Discover Ireland website	Plan Manager Businesses North Mayo Promotions Office	
6	Business 2 Business Selling	Sell experiences to the trade sector and international tour operators. It will be coordinated by the Plan Manager. All trade offerings will be represented at key trade shows, e.g. Meitheal	Plan Manager North Mayo Promotions Office	€2,000
7	Business 2 Business Communication	A monthly short newsletter to be circulated to all businesses in the region giving information on upcoming sales and marketing opportunities via Failte Ireland and Tourism Ireland. Data can be found here: www.tourismirelandindustryopportunities.com/register and it can be coordinated by the Plan Manager	Plan Manager North Mayo Promotions Office	
8	Selling on Ireland.com	The Moy Estuary offers and experiences should be submitted to Tourism Ireland via www.tourismireland.com/industryopportunities This can be done by individual businesses or collectively. As part of this action a training session will be implemented to train all businesses in how to use this international sales and marketing feature of the www.ireland.com website.	Plan Manager All Businesses North Mayo Promotions Office	

		There is a designated area on the Ireland.com website that allows business to submit offers which will then appear alongside dynamic content. Offers will be translated into French, German, Italian, Spanish and Dutch free of charge and offers will appear then as part of major Tourism Ireland campaigns. There are no commission charges applied.		
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Table 9: Marketing and Awareness Costs

Marketing and Awareness	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Visual Identity and Branding	10,000					10,000
Template Marketing Colateral	5,000					5,000
Brand Strategy Communication	2,500					2,500
Annual Social Media Marketing	6,000	6,000	6,000	6,000	6,000	30,000
Web and Social Media Marketing Resource	12,000	12,000	12,000	12,000	12,000	60,000
Destination Website	10,000	3,000	3,000	3,000	3,000	22,000
Visitor flyers and brochures	3,000	3,000	3,000	3,000	3,000	15,000
PR Plan & implementation	10,500	10,500	10,500	10,500	10,500	52,500
B2B Selling	2,000	2,000	2,000	2,000	2,000	10,000
TOTAL	61,000	36,500	36,500	36,500	36,500	207,000

THEME 4 – IMPLEMENTATION

This theme refers to managing the implementation of this plan, the impacts of visitation, industry organisational management and industry professional development.

A brief summary of management roles includes:

- Securing investment for projects, infrastructure and service
- Securing ongoing investment for operational items such as marketing, sales and training
- Managing the visitor impact on towns and small local coastal communities
- Creating a visitor servicing model for the future – meeting the needs of present and future visitors
- Community engagement and increasing understanding of the value of the visitor economy within communities
- Providing professional development opportunities for industry
- Ensuring a long term sustainable partnership for the area
- Collaboration between operators both within a destination and whole of region

IMPORTANCE OF COMMUNITY ENGAGEMENT

Tourism has a positive social, cultural and economic impact on local communities. It provides for additional infrastructure and services that may otherwise not be possible or sustainable without visitors. The tourism sector to be sustainable must engage local host communities in key decision making.

IMPORTANCE OF VISITOR SERVICING

Excellence in customer service, leads to increased yield, repeat visitation and positive word-of-mouth referrals. Visitors to the region have high expectations and the region's target markets are experienced travellers who compare the region with other destinations they have visited. Visitor servicing is an opportunity to create a culture of 'service excellence' as a competitive advantage to match the outstanding natural appeal of the region.

Key actions will include:

- Develop visitor service standards for operators to provide for greater consistency
- Continue research to benchmark, measure and report on visitor satisfaction performance.
- Develop a Visitor Experience Excellence program for implementation at a local destination and business level,

IMPORTANCE OF COOPERATION

As the Moy Estuary Region lies between the counties of Mayo and Sligo, tourism development marketing and promotion is currently organised under two local authorities. While they work and cooperate well, their main focus from a marketing perspective is their own county, rather than a destination led approach. Success is dependent on a working partnership model of public, community and private stakeholders. This necessity was strongly recognised throughout the consultation phase of this plan.

The ambition for tourism growth in the Moy Estuary region is large and a more collaborative response to experience development, marketing and promotion is required to achieve this. This will require stronger cross county collaboration to maximise the opportunities. Most particularly this will apply to the joint development of the hero product, the Greenway as proposed. In addition the development of joined up experiences amongst product providers requires the cooperation of accommodation providers, food service, activity providers and attractions.

To ensure excellent delivery of the desired destination experience it is important that the statutory sector including state agencies and local authorities, the private sector and the community sector work together in a collaborative way. Local authorities are a key partner in delivering much of the infrastructure and public realm works as identified. Failte Ireland is an important partner in developing industry capability to deliver excellent experiences and in marketing support and Tourism Ireland will be critical in overseas marketing and promotions.

DELIVERY STRUCTURE

Strong local organisations are critical to the success of tourism in the Moy Estuary. They provide the greatest opportunity to engage locally, champion industry and community issues, and facilitate a cooperative approach to marketing, management and product development.

**The best results will come from maximum collaboration at the local level
to create a forward looking and sustainable region**

The actions and initiatives in this plan provide a clear direction going forward for the development of the visitor economy on a cross county basis. It will only be of value if key stakeholders work together on a partnership basis and agree and take collective actions to implement the actions. This will bring about the desired change and deliver growth.

There are a number of important existing agencies and bodies involved at public, community and private level. These bodies all play an important role and will do so in the implementation of this plan. They include:

- Mayo County Council
- Sligo County Council
- North Mayo Promotions Office
- Moy Valley Resources
- Ballina Lions Club
- Ballina Chamber of Commerce
- Sligo Tourism Ltd
- Killala Community Council
- Enniscrone and District Community Development
- Castleconnor Community Council
- Private and Community sector

The structure of the partnership required is based on the above partnership agreeing and working to an implementation plan on an annual basis. A Destination Steering Group will be established and charged with setting and monitoring an annual work plan, initially this will be the existing North Mayo Promotions Office Steering Group strengthened with new members as appropriate. This group will meet on a quarterly basis to review progress, make decisions as necessary and adjust the strategy as required. The group will delegate roles and actions to specific partners who are best placed to deliver. A lead overseeing partner will be appointed with a dedicated professional resource to be the driving force behind the implementation of the strategy.

The implementing structure is based on a tripartite structure representing the interests of all stakeholders from both counties Mayo and Sligo. Coordinating this group is seen as a role for Moy Valley Resources who have long established links and track record in communities across both counties. This leadership role gives them responsibility for action implementation and monitoring progress with monitoring and direction provided by the overall destination steering group. North Mayo Promotions Office will take on the marketing / promotions / sales role with resources provided by the partners to the strategy. The destination steering group will agree annual implementation plans and key performance indicators and monitor these on a regular basis.

The delivery Partnership should be constructed and resourced along the following model:

- Agree a shared vision and deliverables
- Define roles and responsibilities through an agree partnership terms of reference
- Agree the resources and services to be made available to the group and who will be responsible for management of the resources
- Agree an annual work plan and monitoring arrangements

SUSTAINABILITY

The plan recognises that with growth comes responsibility. It is vital that tourism or increased activity does not degrade or destroy the environmental assets that are one of the bedrocks of its future viability. The growing interest in green tourism from a world-wide perspective is undeniable and presents many opportunities to bring new audiences to the area. Environmental sustainability runs as a horizontal strand through both this plan and its actions. The steering group will ensure that all actions further the undertaking towards achieving a more sustainable society.

Figure 7: Implementation Structure



There is a necessity for a Moy Estuary team to be established involving all stakeholders who have a role to play in the management and implementation of the plan. For the team to be an “effective partnership” it requires representation and full engagement from all stakeholders that have a role in the development of the area. Table 10 set out an indicative list of stakeholders.

The team must have strong operational capacity and will be responsible for implementing and driving the plan. The role is to adopt and agree the plan and delegate the implementation of projects to project groups, review periodically the progress made, propose and adopt amendments to the plan from time to time and act as the coordinating body for the development of the area. It is extremely important that the team collectively agree to the plan and its actions and are dedicated to its implementation.

Table 10: Proposed Team Membership

Public	Private	Voluntary / Community
Mayo County Council	Ballina Chamber of Commerce	Moy Valley Resources
Sligo County Council		Killala Community Council

North East Mayo LEADER		Enniscrone Development Association
Fáilte Ireland		Local Residents Associations
Coillte		
Inland Fisheries Ireland		

The following actions are required to establish the implementation framework

Action	Description
Devise and Agree Terms of Reference	Ensure that terms of reference have an: <ul style="list-style-type: none"> <input type="checkbox"/> Agreed shared vision <input type="checkbox"/> Identified clearly the roles and responsibilities of all partners <input type="checkbox"/> Agreed and identifies how resources and funds will be acquired and used
Resources	Prepare a schedule of resources required and how these can be sourced
Quick Wins	The first role of the steering group should be to identify and achieve “quick win” projects that will build buy in, commitment and belief in the strategy
Working Schedule	Set a work and meeting schedule on an annual basis so all members are aware of the commitment and responsibility involved

Table 11: Implementation Costs

Implementation	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Salary of Plan Manager	65,000	65,000	65,000	65,000	65,000	325,000
Overheads and Administration	9,750	9,750	9,750	9,750	9,750	48,750
External Expertise	11,000	11,000	11,000	11,000	11,000	55,000
TOTAL	85,750	85,750	85,750	85,750	85,750	428,750

THEME 5 – CAPABILITY BUILDING

The aim of this theme is to increase and grow the capacity of industry to create and promote experiences, deliver exceptional customer service and maintain a fully sustainable destination.

If the destination is to provide world class visitor experiences and present itself as a unique and must do region, then ongoing multi-faceted education and capacity building programmes are required. As tourism exists in a fast changing environment where consumer needs change frequently, those destinations that understand the industry and its nuances and are quick to adapt to consumer desires will win. They will be the destinations that can build a lasting and sustainable industry and pinpoint new investments required before others. Resources must also be allocated to ensure that the regions industry can upskill and build capacity.

Education and skills needs can be addressed through much of the provision already in existence via Failte Ireland. This will require the implementing body to work closely with Failte Ireland in identification of needs and development of suitable programmes. Provision of information on programmes to members will be a further role that the implementing partner will coordinate.

Investment in education and capacity building should focus on:

- ❑ Servicing the international visitor
- ❑ Selling at trade shows and to the trade sector
- ❑ Developing “Saleable experiences and packages” for national and international markets
- ❑ Increasing capability in digital skills and digital story telling capabilities
- ❑ Sustainable tourism visitor management.
- ❑ Building and increasing off peak and shoulder business including event management and organisation
- ❑ Destination awareness building for business, community and private sector

The actions under this theme aim to strengthen and add value to the work already taking place throughout the region. North Mayo Promotions Office already delivers network events, destination awareness workshops, and master lectures. In March 2020, they hosted Meet Mayo North, an annual networking event for local industry with over 80 stakeholders in attendance (usually around 150-200). The office promote and encourage attendance at training events to the 400+ local stakeholders and work with Fáilte Ireland to address gaps in capacity/training.

Education and Skills				
No.	Action Title	Action Description	Stakeholders	Indicative Cost
1	Moy Estuary Network	Establish one database of all businesses/groups with whom to work with. This can then be used for training invites, launch invites, networking, e-zines, general updates and knowledge of each other.	Plan Manager North Mayo Promotions Office	
2	Network Events	<p>Organise a series of annual network events to encourage sharing of ideas and development of linked up experiences.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Selling skills for B2B business <input type="checkbox"/> Digital and social media marketing <input type="checkbox"/> Moy Estuary Region knowledge and awareness of what is there <input type="checkbox"/> Two hour evening speed networking session. At this event attractions and activity providers are invited to bring their stands and are given a table to work from. Accommodation providers rotate from table to table, allowing 10 minutes per session. The purpose is the very initial stages of motivating people to truly work together 	Plan Manager North Mayo Promotions Office	€800 per session
3	Destination Awareness Workshops	<p>Arrange Moy Estuary workshop for all those living and working in the area (tourism businesses, retailers, local Gardaí, general public etc).</p> <ul style="list-style-type: none"> <input type="checkbox"/> The importance of tourism to the area <input type="checkbox"/> Who are our visitors and what are they looking for when they visit <input type="checkbox"/> What is on in the area and where to visit 	Plan Manager North Mayo Promotions Office	€600
4	Experience Development Workshops	How to develop market compelling visitor experiences and bring these to market	Plan Manager North Mayo Promotions Office	€1,000 per workshop

5	Master Lectures	Twice a year to hold Guest talk by expert on aspects of visitor economy, sustainable tourism, future trends etc.	Plan Manager	€1,000 per workshop
6	Encourage attendance at training and capability building events	Through provision of information and working with partners such as Failte Ireland to encourage and inform the network of upcoming relevant training and capability building events	Plan Manager North Mayo Promotions Office	
7	Engagement	Engage with education and training providers to provide tourism and hospitality training and capability development in the destination	Plan Manager Failte Ireland IT Sligo GMIT MSLETB	

Table 12: Capability Building Costs

Education and Skills	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Annual Training - 12 events per year	9,600	9,600	9,600	9,600	9,600	48,000
Destination awareness workshops - 3 per year	1,950	1,950	1,950	1,950	1,950	9,750
Experience development workshops - 2 per year	2,000	2,000	2,000	2,000	2,000	10,000
TOTAL	13,550	13,550	13,550	13,550	13,550	67,750

FUTURE AND LONG RANGE AMBITIONS

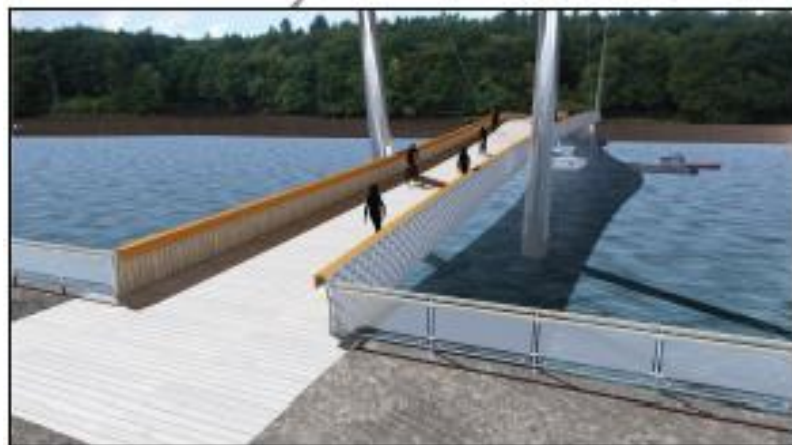
The actions and projects identified in this plan is not a conclusive list. As implementation happens and the area develops and grows strategies will need to be flexible and change to meet challenges that lie ahead and also capitalise on emerging opportunities such as funding and investment. A good plan includes goals and objectives, desired outcomes, metrics for measuring progress, timelines, and budgets. A good plan is also not rigid and recognises that external factors can change in the future which could not be predicted at the time of plan preparation. The process undertaken in the development of this plan was to arrive at agreed projects by consensus.

Through the various consultations there were many projects and initiatives that were presented which are not included directly in the proposed actions for the first 6 years of this plan. This does not mean that are not relevant or attractive to develop. Such projects were very large in nature and will require significant investment and planning. While they are very relevant the strategy has focussed on the first five years in putting in place significant infrastructure and projects that will have broad region wide appeal and presence and allow the towns of Ballina, Killala and Enniscrone to build supporting and complementing experiences around the Greenway for example. It is felt that this approach provides a more balanced spread of the impacts and benefits.

Concentrating investment into the Greenway under this plan ensures a singular focus that puts in place infrastructure bringing significant return through visitation and spend. This will give the region a confirmed and viable baseline to use to underpin business cases for other large projects. These include:

- ❑ The pedestrian bridge across the Moy at the quays which will complement and add value to the greenway and the quay area
- ❑ Development and planning of new innovative experiences such as the proposal for a suspended rope bridge linking the Dun Bhriste sea stack with the mainland.
- ❑ Cable car link to Bartragh Island
- ❑ Major marine and outdoor adventure centre at Beeleek Castle

Moy Pedestrian Bridge



*Rope Bridge to Dun
Bhriste Sea Stack*



*Cable Car to
Bartragh with views
over the Estuary*



*Beeleek Adventure
Centre*



MONITORING AND EVALUATION

The Implementation Group will regularly monitor the implementation of the strategy. An annual work programme will be devised and monitored at quarterly meetings, ensuring appropriate implementation and adjustment as required. The annual work programme will include key deliverables and metrics that can be compared with the plans metrics on an ongoing basis.

Monitoring and evaluation activities will include:

- Monitoring progress made in respect of achieving goals and outcomes
- Identifying actions required to resolve delivery issues
- Identifying resources or partners to support actions
- Appointing of resources or partners to support resolution of delivery issues
- Conducting an annual review of overall strategy implementation
- Setting and approval of the annual work and implementation programme on an annual basis

FUNDING AND RESOURCES

A budget and resources have to be made available to support the implementation of actions. Possible funding and resources will be from a range of state and public sources as well as private contributions. Potential sources include:

Funding Body	Programme	Details
Failte Ireland	Failte Ireland Capital Programme	<p>€150m Capital Investment Programme to develop visitor experiences that align with the 4 national brand propositions</p> <p>Calls for funding are made from time to time, typically every 12 - 15 months.</p> <p>Eligible applicants can be private sector and / or public bodies. Typical investment is €2.5m plus.</p>
Failte Ireland	Business and Industry Supports	<p>Makes available expert business and capability building supports to industry</p> <p>Supports can be in the form of training programmes and mentoring assignments</p> <p>Individual businesses, groups of businesses or networks of operators can avail of such supports</p> <p>They cover all operational areas from finance, product development, marketing, sales, experience development etc</p> <p>Full details on Failte Ireland website</p>

Failte Ireland	Festivals and Events Programme	Provides financial support to festivals and events that have capability to increase the numbers of bed nights and overseas visitors
LEADER – National Rural Development Programme	Capital Investment Supports Operational and Capability Building Supports	Can provide grants at rates of up to 80% for capital investment for businesses in rural areas. Up to €250,000 in funding can be secured. Support for smaller scale capital projects such as visitor experiences, infrastructure, product development Support for marketing initiatives for domestic and overseas markets Capability building such as training and mentoring
Rural Regeneration and Redevelopment Fund	Capital Investment Supports	Funding is available for suitable economic regeneration projects in towns with less than 10,000 people and rural areas. The fund can be used for large scale projects that involve collaboration between government departments, agencies, local authority's communities and private sector to support sustainable regeneration, encourage entrepreneurship and innovation. Suitable projects could include Greenways, the offshore diving reef.
Department of Rural and Community Development		Opportunities for funding exist within various government departments including DRCA for walking trails, greenways, cycle trails and village enhancement Calls are issued from time to time and generally need cooperation of a local authority
Inland Fisheries Ireland		Will provide investment in angling infrastructure and supports for shore and sea angling
Local Enterprise Offices	Capital Investment Marketing Investment Training Employment Grants	Provide a range of business capability and training programmes. Capital grants for private sector business developments. In the tourism space projects must attract overseas visitors Can provide grants for marketing campaigns, branding etc Employment grants available for new jobs in certain enterprises.

9. OUTPUTS AND RESULTS – GROWTH TARGETS

HEADLINE ECONOMIC IMPACTS

Based on using the economic impacts model as outlined below, the economic impacts to the Moy Estuary and wider region as a result of implementation of the actions in this plan over its first 6 years are:

INDICATOR	Year					
	1	2	3	4	5	6
Total Additional Overseas Visitors	22,875	25,419	27,890	30,045	31,960	33,738
Total Additional Domestic Visitors	73,625	82,256	90,569	98,069	104,607	110,553
New Bednights Generated	42,000	52,945	64,645	78,933	93,147	107,588
Tourism Revenue Generated	5,493,125	6,670,683	8,012,874	9,537,528	10,983,835	12,538,297
New Jobs Supported	193	234	281	335	386	440

METHODOLOGY

VISITOR NUMBERS

The presence of additional or new visitors to the Moy Estuary area is the basis on which economic impacts and return on investment is calculated. While visitors will be attracted to go to the region for many reasons such as the quality of its experiences or visiting friends and relatives, it is mainly the key attractor of the region and the associated range of experience's that will drive the majority of visitation. As the plan revolves around using the Estuary based Greenway as the hook attractor for the region, growth in visitor numbers, bed nights and revenue are based around the potential that such a Greenway offers.

There is available research in Ireland conducted on existing Greenways that shows they have a significant impact on the local economies where they are based. Cycling and walking greenways are one of the biggest success stories in Irish tourism. The first Greenway in Ireland is the hugely successful Great Western Greenway Westport to Achill route and since then a number of other successful developments have followed. In particular of note are:

- ❑ The number of tourists coming to Ireland on walking and cycling holidays has grown exponentially; from 37,000 in 2012 to 1.8m in 2017.
- ❑ In 2018, 46 per cent of all overseas holidaymakers to Ireland engaged in walking and cycling as part of their holiday experience.

For the newly opened Waterford Greenway, Failte Ireland research shows it is the dominant factor drawing visitors to the region with the following findings:

- ❑ Over 280,000 tourists have visited the Waterford greenway
- ❑ 68 per cent of those visitors said it was the main motivation for their visit to Waterford.

An Economic Impact study carried out on the Great Western Greenway using 2011 data showed:

- ❑ Direct expenditure associated with the Greenway would contribute to a projected €7.2m in spend in the local economy over a full year in 2011.
- ❑ Visitors using the Greenway in 2011 of 57,200 of which 8,000 were from overseas
- ❑ Overseas visitors stayed an average length of 6.8 days and domestic visitors an average length of 4.8 days.
- ❑ Average spend per overseas visitor - €50.71 per day
- ❑ Average spend per domestic visitor - €49.85 per day

Since then visitor numbers to the Great Western Greenway have increased and grown much more and are currently up to 250,000 per year.

Visitor numbers to the area will be calculated based on estimated demand and usage assuming that the Moy Estuary Greenway is developed and a number of complementing experiences associated with the Greenway.

The following metrics are used in calculation of economic impacts

- ❑ Average spend per day of overseas visitor - €65
- ❑ Average spend per day of domestic visitor - €50
- ❑ Bed nights generated per overseas visitors – 5
- ❑ Bed nights generated per domestic visitors – 3

REVENUE GENERATED

The money spent by visitors has a large multiplier impact as the money is recycled through wages, salaries and supplies of good and services. A multiplier effect of 1.3 is used to calculate the indirect impacts of visitor spend in the area.

JOBS SUPPORTED

Tourism provides economic impacts in a number of ways, many of which are not immediately apparent as the activity happens across a destination rather than in a single space. Firstly it provides employment, across many sectors that include accommodation, food and drink, visitor centres, museums and activity providers for example.

Failte Ireland statistics state that for every €1mn of tourist expenditure it helps to support 27 tourism jobs and every 1,000 additional overseas tourists supports 19 jobs in the tourism industry. The spread of tourism allows employment and business opportunities to arise in places where there is little other economic activity, therefore it has an important role in rural and community development and sustainability.

ECONOMIC IMPACTS

Table 13 shows the calculated economic impacts of the strategy to the area over a 6 year time span. This is arrived at from a dual calculation as follows:

A specific calculation of the impacts of the proposed new Greenway using known visitor metrics from the impacts of the Great Western Greenway which has factored downwards to take into consideration the shorter length of the proposed Moy Estuary Greenway

A conservative calculation of likely impacts from other investments arising under this strategy, specifically the following. Any other impacts that may arise are not considered, but would be additional to those shown:

- Diving Reef at Killala
- Events at new Civic Space at Ballina Quay
- Visits to Salmon Life Centre Ballina
- Increased water based experiences at Enniscrone, Ballina and Killala (E.g. boat trips, surfing etc)

Table 13: Economic Impacts of Greenway Investment

		Year					
		1	2	3	4	5	6
Visitors to Greenway							
	Growth rate		20%	15%	15%	10%	7%
	Domestic	20,000	24,000	27,600	31,740	34,914	37,358
	Overseas	5,000	6,000	6,900	7,935	8,729	9,339
	TOTAL	25,000	30,000	34,500	39,675	43,643	46,697
Bednights Generated							
	Domestic	20,000	26,400	33,396	42,246	51,118	60,165
	Overseas	10,000	13,200	16,698	21,123	25,559	30,083
	TOTAL	30,000	39,600	50,094	63,369	76,676	90,248
Revenue Generated							
	Domestic	€1,000,000	€1,386,000	€1,840,955	€2,445,248	€3,047,512	€3,694,530
	Overseas	€650,000	€900,900	€1,196,620	€1,589,411	€1,980,883	€2,401,444
	TOTAL	€1,650,000	€2,286,900	€3,037,575	€4,034,659	€5,028,395	€6,095,974
Induced Economic Impact		€2,145,000	€2,972,970	€3,948,847	€5,245,057	€6,536,914	€7,924,766
Jobs Supported							
	New Jobs supported	58	80	107	142	176	214

Table 14: Economic Impacts – Other Projects

		Year					
		1	2	3	4	5	6
Visitor Numbers							
	Diving Reef	1,500	1,725	1,932	2,125	2,295	2,433
	Ballina Quay Events	15,000	16,200	17,496	18,371	19,289	20,254
	Salmon Life Centre	50,000	54,000	58,320	61,236	64,298	67,513
	Water Based Experiences	5,000	5,750	6,210	6,707	7,042	7,394
Bednights Generated							
	Domestic	9,000	10,009	10,913	11,673	12,353	13,005
	Overseas	3,000	3,336	3,638	3,891	4,118	4,335
	TOTAL	12,000	13,345	14,551	15,564	16,470	17,340
Revenue Generated		€3,843,125	€4,383,783	€4,975,299	€5,502,869	€5,955,439	€6,442,323
Induced Economic Impact		€4,996,063	€5,698,918	€6,467,888	€7,153,730	€7,742,071	€8,375,020
Jobs Supported							
	New Jobs supported	135	154	175	193	209	226