

**Leitrim**  
explore • experience • enjoy

# Tourism in Leitrim Review and Framework 2023-2027



Comhairle  
Chontae  
Liatroma | Leitrim  
County  
Council





Comhairle Chontae Liatroma  
Leitrim County Council

|Bane Mullarkey|

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## Foreword

**The County Leitrim Tourism Framework 2023-2027 provides the strategic focus and vision for Tourism development in the County. Led by Leitrim County Council with contributions from local, regional and national tourism stakeholders, the Framework provides a strategic roadmap for the development of sustainable tourism for the period 2023 – 2027.**

External contributions were facilitated by a comprehensive consultation exercise, which is reflective of the needs of the local and regional tourism sector while being informed by best practices within the industry. In that regard, it provides a focus on marketing and communication mechanisms through the use of web and digital technology, in particular, to ensure promotion and destination awareness of the brand 'Explore Experience and Enjoy'. The Framework also promotes collaboration with Fáilte Ireland and Tourism Ireland to maximise the potential of Ireland's Hidden Heartlands and the Wild Atlantic Way for the benefit of the County. It also seeks to build on industry collaboration and capability through tourism awareness programmes and training plans, preparation of visitor service plans and industry and business-to-business (B2B) networking.

The Council would like to acknowledge the work undertaken by Bane Mullarkey Consultants in the development of the Framework and thank them for their dedication and vision in developing the document. The Council also wish to acknowledge the input of the various stakeholders and trade providers who contributed to the process. With the continued support of all these stakeholders and tourism providers and indeed all of those who are interested in the promotion of Leitrim from a tourism perspective, the Council is confident that the implementation of the actions as set out in the Framework will provide a foundation for the continued sustainable growth of tourism in County Leitrim and will result in the County maximising its potential as a destination of choice for many domestic and overseas visitors.



**Justin Warnock**  
Cathaoirleach Leitrim County Council



**Joseph Gilhooly**  
Chief Executive Leitrim County Council  
(Interim)



# Introduction 1



# 1 Introduction

## 1.1 Purpose of this document

**This document presents a review and analysis of tourism in Leitrim and a framework and action plan that will guide the development and management of sustainable tourism growth throughout the county over the next five years.**

The Framework is being developed against a backdrop of challenges and uncertainty brought about by Brexit, Covid-19, the Ukrainian conflict, an energy crisis, high inflation, staff and accommodation shortages.

However, there is much to be optimistic about too:

- Leitrim has seen significant public and private sector investment over the past five years, with more planned and underway.
- The positioning across two destination brands – Ireland’s Hidden Heartlands and the Wild Atlantic Way – presents tremendous opportunities for Leitrim.
- Sustainability is now more important than ever, and Leitrim’s strong eco credentials offer competitive advantages.
- A desire among all stakeholders for a renewed focus on enhanced collaboration and networking.
- Transformational impacts can accrue from optimising digital sales and marketing.
- A nurturing environment for new tourism businesses will position Leitrim to capitalise on its opportunities.



# The current landscape 2



## 2 The current landscape

### 2.1 National

#### Review

The speed and strength of tourism recovery in 2022 exceeded expectations, according to the Irish Tourist Industry Confederation (ITIC)<sup>1</sup>. With an estimated 7 million international tourists, this represented a 73% recovery compared to the pre-pandemic peak of 2019. Pent-up demand, deferred bookings and accumulated savings all boosted business.

In the domestic market, the Fáilte Ireland<sup>2</sup> Tourism Barometer noted that domestic travel, which dominated in 2020-2021, remained important in 2022.

#### Outlook

For 2023, Tourism Ireland<sup>3</sup> aims to rebuild revenue from overseas holidaymakers to pre-pandemic levels by focusing on markets that deliver the greatest revenue.

The Fáilte Ireland Tourism Barometer notes that the domestic market will remain important, with 39% of industry predicting it to be up on 2022 levels, and 37% predicting the same level as 2022.



<sup>1</sup> [ITIC, January 2023, Recovery and Outlook](#)

<sup>2</sup> [Fáilte Ireland, December 2022, Tourism Barometer](#)

<sup>3</sup> [Tourism Ireland, January 2023, Marketing Plans launch](#)



## 2.2 Regional

In 2019, tourism was worth €341m in Ireland's Hidden Heartlands and over €3bn on the Wild Atlantic Way.

Table 1: Tourism in 2019

		Overseas	Domestic	N. Ireland	Total
Ireland's Hidden Heartlands	Tourists	449,000	784,000	120,000	1.3mn
	Revenue	€178mn	€129mn	€34mn	€341mn
Wild Atlantic Way	Tourists	3.4mn	5.0mn	605,000	9mn
	Revenue	€1.9bn	€1.1bn	€186mn	€3.186bn

Source: Tourism Facts, 2019, Fáilte Ireland

Table 2 shows average spend and average overnights in each region. The highest spend and longest stay is among overseas visitors on the Wild Atlantic Way while the lowest spend and shortest stay is among domestic visitors in Ireland's Hidden Heartlands.

Table 2: Spend and nights

		Overseas	Domestic	N. Ireland
Ireland's Hidden Heartlands	Avg. Spend	€397	€164	€280
	Avg. Nights	6.1	2.3	2.6
Wild Atlantic Way	Avg. Spend	€551	€210	€307
	Avg. Nights	6.9	3.0	2.8

Source: Tourism Facts, 2019, Fáilte Ireland

## 2.3 Leitrim

**Official tourism data is published at a destination level and not at a county level. However, by examining the accommodation supply in Leitrim and in Ireland's Hidden Heartlands (IHH), it is possible to estimate tourism numbers and revenue for Leitrim.**

Although most of Leitrim's accommodation is in Ireland's Hidden Heartlands, there is also some stock of Fáilte Ireland listed accommodation in the Wild Atlantic Way areas of the county. However, as these numbers are small, it is not possible to estimate what share of total WAW tourism accrues to Leitrim in the same way as one can for IHH.

The Fáilte Ireland accommodation supply dashboard<sup>4</sup> shows that Leitrim has a 14% share of all tourist bed spaces in Ireland's Hidden Heartlands (across cruising berths, B&B, C&C, guesthouse, hotel, self-catering, and welcome standard).

**Table 3: Accommodation stock in Ireland's Hidden Heartlands and in Leitrim**

Ireland's Hidden Heartlands			Leitrim <sup>5</sup>			Leitrim's share	
Properties	Rooms/ units	Bed spaces	Properties	Rooms/ units	Bed spaces	Rooms/ units	Bed spaces
737	5,978	17,544	321	462	2,527	8%	14%

Source: Fáilte Ireland, March 2022, Accommodation supply dashboard



<sup>4</sup> [Fáilte Ireland, March 2022, Accommodation supply dashboard](#)

<sup>5</sup> See Table 6 for a full picture of Leitrim's accommodation base.



Drawing on the accommodation stock, it is not unreasonable to assume that Leitrim gets 14% of IHH tourist numbers and revenue. This means that in 2019<sup>6</sup>, Leitrim's tourism economy was estimated to be worth almost €50mn and the sector supported 1,120 jobs.

**Table 4: 2019 numbers & revenue estimate**

		Tourists	Revenue
<b>Overseas</b>	Ireland's Hidden Heartlands	449,000	€178mn
	<i>Leitrim</i>	<i>64,000</i>	<i>€25mn</i>
<b>Domestic</b>	Ireland's Hidden Heartlands	784,000	€129mn
	<i>Leitrim</i>	<i>112,000</i>	<i>€18mn</i>
<b>N. Ireland</b>	Ireland's Hidden Heartlands	120,000	€34mn
	<i>Leitrim</i>	<i>17,000</i>	<i>€5mn</i>
<b>Total</b>	<b>Ireland's Hidden Heartlands</b>	<b>1,353,000</b>	<b>€341mn</b>
	<i>Leitrim's share at 14% of IHH total</i>	<i>193,000</i>	<i>€49mn</i>

Source: Estimates compiled using Tourism Facts 2019: Ireland's Hidden Heartlands and Fáilte Ireland Accommodation Supply Dashboard

This is a conservative estimate of Leitrim's tourism economy, due to the lack of published data available about the accommodation stock in the northern part of the county.

The absence of data does not however take from the importance of the Wild Atlantic Way to tourism businesses and communities in North Leitrim. The county's coastline may be small in comparison with other Wild Atlantic Way counties, but the brand proposition extends inland as far as Manorhamilton and is therefore significant for tourism businesses and communities in that area.

<sup>6</sup> 2019 is latest available data.

## 2.4 Leitrim performance vs targets

The previous Tourism Strategy for Leitrim set targets over its lifetime, 2015 to 2021. The target for 2021 was 296,000 visitors, €70mn revenue and 2,400 tourism jobs.

When that strategy was developed in 2014, the words Brexit and Covid were in nobody's vocabulary, Ireland's Hidden Heartlands wasn't on the radar, and sustainability and climate action were further down the agenda than they are today.

The estimate of Leitrim's tourism economy being worth almost €50mn in 2019 is conservative. Comparing that 2019 estimate to the targets from the 2015-2021 Strategy it is clear that overseas and domestic markets were performing strongly versus target, while the Northern Ireland market, at the time, had been severely impacted by Brexit.

### Northern Ireland and Brexit

The Fáilte Ireland Tourism Barometer 2019<sup>7</sup> found that more than half of businesses around the country stated business was "down from Britain and Northern Ireland". While the entire country reported feeling the effects of the Northern Ireland downturn due to Brexit, the northern border counties felt the greatest impact. This impact is reflected in the estimates for Northern Ireland visitors to Leitrim, as noted in the table below.

**Table 5: Tourism in Leitrim – 2019 estimates vs targets**

	2019 estimate	2019 target
Overseas	64,000	66,000
Domestic	112,000	118,000
N. Ireland	17,000	59,000
<b>Total</b>	<b>193,000</b>	<b>243,000</b>

Source: Consultant performance estimates for 2019. The 2019 targets were set in Leitrim Tourism Strategy, 2015-2021<sup>8</sup>.

The analysis would suggest that tourism in Leitrim was certainly on an upward trajectory, a pattern that has been reflected in consultation with industry, communities and stakeholders.

The upward trajectory was supported in no small part by significant state investment in tourism and leisure infrastructure.

<sup>7</sup> [Fáilte Ireland Tourism Barometer September 2019](#)

<sup>8</sup> See appendices for full table of 2015-2021 targets.

## 2.5 Leitrim's position across two destination brands

**Similar to counties Galway and Clare which are positioned within two destinations brands, parts of County Leitrim are in Ireland's Hidden Heartlands and parts are on the Wild Atlantic Way.**

Ireland's Hidden Heartlands is a close fit with a large part of Leitrim; Leitrim can be to the fore of the brand's ambitions and a key contributor to the *Destination and Experience Development Plan (DEDP)* for Upper Shannon, Shannon-Erne and Border area that is currently being developed.

One third of County Leitrim is included in the Wild Atlantic Way<sup>9</sup> destination brand and Leitrim is referred to in the DEDP for Sligo regarding two capital projects.

Notwithstanding the coastal location and the fact that the destination brand extends to Manorhamilton, the potential for businesses aligning with the Wild Atlantic Way has not yet been optimised in the northern part of the county. Missed opportunities may in part be attributed to the fact that easy access to the coast was not possible in the past. However, recent developments at Tullaghan include a viewing area, picnic benches, car park and access to the shoreline, offering additional and new opportunities for surfing, walking and cycling along the coast and further inland.

The iconic Cliff Walk from Bundoran to Mullaghmore<sup>10</sup> will be transformational for the area. It will unlock new potential for a range of things to do and it will encourage longer dwell time in the area. Now is the time for local businesses to commence development of new Wild Atlantic Way aligned products and experiences, so they are market ready to complement and service the cliff walk when it is completed.

Leitrim's positioning in two destination brands presents significant opportunities and tourism businesses can compete for market share under either brand umbrella, depending on their experience.



<sup>9</sup> Fáilte Ireland, *Wild Atlantic Way Regional Tourism Strategy, 2023-2027*

<sup>10</sup> Project outlined in Fáilte Ireland, *Bundoran Tourism Development Projects Masterplan, June 2022*

## 2.6 Leitrim's accommodation base

The Fáilte Ireland Accommodation Supply Dashboard shows that in March 2022, Leitrim had 123 accommodation properties with 1,579 bed spaces, and 198 cruiser berths with 948 bed spaces.

**Table 6: Accommodation in Leitrim**

	Properties	Rooms/ units	Bed spaces
B&B	3	11	25
C&C	2	65	260
Guesthouse	2	16	41
Hotel	8	222	551
Self-catering	33	33	177
Welcome Standard	75	115	525
<b>Sub-total</b>	<b>123</b>	<b>462</b>	<b>1,579</b>
Cruising berths	198	-	948
<b>Total accommodation supply</b>	<b>321</b>	<b>462</b>	<b>2,527</b>

Source: Fáilte Ireland Accommodation Supply Dashboard

Additional points to note:

- In addition to the above, there are privately-owned cruisers in Leitrim.
- Government contracts to house refugees have absorbed significant stocks of tourist accommodation in all parts of the country, including Leitrim. Many consultees raised concerns about the impact this will have if some providers decide not to reopen for tourism purposes when Government contracts end.
- The shortage of camping sites was highlighted as part of the consultation process. Waterways Ireland is currently auditing potential sites for new camping/ glamping/motorhome and EV charging facilities and there are opportunities for private or community investment in camping and glamping facilities.

## 2.7 Leitrim's product and experience base

### Cruising

Fáilte Ireland categorises tourism products as iconic, signature, supporting, complementary or ancillary. To Leitrim's big advantage, one of the two iconic products in Ireland's Hidden Heartlands is cruising on the Shannon, with Carrick on Shannon the main hub for the cruise hire industry.

Although the hire fleet has reduced from its peak during the period 1994-2002, cruising remains extremely important for Leitrim, attracting European (Germany, Austria and Switzerland with an average stay of one week) and domestic (average stay of three nights) visitors. Satisfaction levels (~80%) and repeat business are both high.

The climate crisis presents challenges for cruising with investment required to bring the fleet up to appropriate eco standards. There are also opportunities to make marinas in Leitrim carbon neutral by using wind and solar technologies.

An aim of the Shannon Masterplan is to position the Shannon as one of Europe's largest eco-tourism destinations. This presents significant opportunities for Leitrim, while enhanced engagement between onshore tourism businesses and cruise hire companies featured during consultation, as something to focus on in the future.

*"Leitrim is very easy, very family friendly. Unlike some other counties, there are no extremes so it's good for dabblers. It can offer a sense of adventure, yet it is achievable."*

*Agency interview*



*"The cruising season now extends from Mar 17 – end October - that's 32 weeks of "pure" tourism".*

*Stakeholder interview*

### Blueways, greenways, walking and cycling

Significant investment in infrastructure and trail heads over the past decade has positioned Leitrim as an attractive destination for outdoor activities.

Given the growth in consumer demand for outdoor recreation, Leitrim has great potential in this space. To bring blueways and greenways to life, there are opportunities for businesses and communities to provide other essential aspects of the visitor experience such as bike hire, canoe hire, guided walks, refreshments, accommodation, etc.



## Angling

Leitrim has a strong track record for angling with excellent fish stocks and some well-established angling hubs. Several consultees were positive about the future potential of angling; among both experienced anglers and families / cruise visitors who want to “have a go”. Both segments have different requirements with experienced anglers having a long length of stay (at least one week) and B&Bs their #1 choice for accommodation. Experienced anglers are also more likely to use an angling guide and they need accommodation that is angler-friendly - good drying room, facility to store bait, etc. The dabbler or “have a go” market on the other hand is more likely to want a couple of hours or a half day experience. Although angling may not enjoy the participation levels of previous decades, and angling competitions appear to have waned in popularity, opportunities remain.



*“Angling facilities are pretty good in Leitrim, but they could be improved – for example, there is a fantastic marina at Drumkeeran, but no slipway”.*

*Angling operator*

Over the longer-term, it is recommended that angling on Lough Allen be developed. Experts note that Lough Allen could be used for angling even in windy conditions but that it needs development e.g., slipway, launching facilities, shelter and access on its west coast. On Lough Allen, there is also potential for other water-based activities but in the short-term benefits are to be gained from ensuring the potential at well-established coarse angling centres in Ballinamore, Carrick on Shannon, Carrigallen, Drumshanbo and Mohill, are optimised.

Inland Fisheries Ireland no longer promotes angling tourism in overseas markets so it will be important that Leitrim County Council and Fáilte Ireland work together to fill this gap.

## Arts, crafts, culture, festivals, events, food and drink

Leitrim’s creativity is inspired by its beautiful landscapes and there are opportunities to further leverage the arts, crafts and culture. Festivals are good for communities as well as for tourists; they help with community self-image as well as bringing fun and enjoyment for locals and visitors. Leitrim also has a growing reputation for great food and drink which can be expanded to include new food and drink tourism experiences.



*“It is important to ensure that Leitrim has a reputation for always being open for food – and that is not the case right now”.*

*Agency interview*

## Visitor attractions

There is a good range of visitor attractions ranging from community-run heritage attractions to internationally renowned commercial operations. They provide visitors with weather independent experiences that tell stories of Leitrim and its people, past and present. There may be an opportunity to develop a visitor attraction that tells the story of Leitrim’s strong connections with water. Capital grants programmes can be targeted for same.



## Conclusion

Leitrim has a very good baseline in terms of its overall tourism offering with products and services that combine to create memorable tourism experiences. Looking ahead, there are opportunities, for both existing and new tourism businesses and communities, to develop new services and experiences that can commercialise large infrastructural investments. A continued programme of training and upskilling to ensure market-readiness will also give Leitrim a competitive advantage over other destinations.





## 2.8 Sustainable and regenerative tourism

**The Regional Development Strategies for the Wild Atlantic Way and for Ireland's Hidden Heartlands emphasise the positive outcomes of regenerative and sustainable tourism for local communities and nature.**

Leitrim can be a central player in helping to realise these objectives by continuing its collaborative work with Fáilte Ireland and other stakeholders. Continuing to build on its strong eco credentials will give Leitrim standing in the market.

## 2.9 The external view – what visitors think

**In developing a framework for the future, it is invaluable to understand the external view; what do visitors to Leitrim think about their trip.**

To this end, an online survey completed by 139 visitors in summer 2022 yielded the following insights:

- A net promoter score (NPS) of 45. This is a very positive result. It means that 59% of visitors to Leitrim would actively recommend or promote the destination to others. A further 27% are more passive in their recommendation and just 14% are detractors (i.e., would not recommend Leitrim as a destination). Given the importance of word of mouth in tourism promotion, this is a very good outcome.
- Highlights of people's trips to Leitrim included the outdoors, scenery, food, friendliness of local people, value for money and meeting up with family/ tracing ancestors.
- For 30% of visitors, pre-trip expectations were exceeded, and for 62% they were matched.
- Satisfaction levels were highest across atmosphere / pace of life; scenery/ environment; activities and heritage/ culture.
- Satisfaction levels were lower with things to do in the evenings and child-friendly experiences.

The overall sentiment of respondent's observations is reflected in the comments below.

## Positives

*"The entire atmosphere and beauty of Drumshanbo, Eagles Rock (Hag's Leap), North Leitrim. Drumshanbo is a killer destination in itself".*

*"The entire trip was a joy from start to finish".*

*The food - didn't expect such high-quality restaurants with local produce".*

*"No matter where you go people are friendly. And places aren't completely overrun which is wonderful when you are trying to escape the daily crazy".*

*"Leitrim is very accessible, we as a family met from the four provinces of Ireland all within a 2-hour drive".*

*"The many walks and breath-taking scenery".*

*"Excellent dining choices. Very high standard of food".*

*"Canal walkways were clean and saw many people out using amenities - camping, paddling, kayaking, cycling. Would like to see more camping facilities".*

## Gaps

*"I think Leitrim has multiple opportunities for tourism on all levels. When we were there, food options at night were a challenge. We ate in many nights. We found many things to see and do during our stay".*

*"I'd like to see a better range of children-oriented playgrounds with amenities for all age groups. Currently there's no facility in Carrick of notable size".*

*"Mountain biking and cycling are our favourite pursuits. We had wanted to rent bikes in Manorhamilton to cycle, but there is no place here to rent bikes".*

*"There is a massive gap of things for under 18's to do. Especially after 5.30. If you're not old enough to drink, or don't drink, there is nothing to do".*

In conclusion, visitors have lots of positive experiences and things to say about their visit to Leitrim and the feedback shows that Leitrim is a good fit with both the Wild Atlantic Way and with Ireland's Hidden Heartlands. Over the life of this new Tourism Framework, efforts will focus on addressing the gaps in the current offering.

### **In addition to the online consumer survey, it is worth noting that:**

These comments were also reflected in stakeholder consultation with many references to feedback from their customers commenting on the range of things to do and see in Leitrim. Many stakeholders also referenced growing levels of repeat visitors.

A review of website traffic to [www.leitrimtourism.com](http://www.leitrimtourism.com) showed it has significantly increased and consistently outperform previous years in 2021, demonstrating growing interest in visiting Leitrim.

# The future vision 3



## 3 The future vision

### 3.1 Vision statement for tourism in Leitrim

*Leitrim is renowned as an exemplar of regenerative tourism where stakeholders realise their shared ambition of sustainable tourism growth for the county. This is achieved through exceptional collaboration, communication, shared learnings and a fully integrated approach to world class experience development, sales and marketing.*



## 3.2 Future consumer trends

**This vision statement is shaped by emerging consumer trends, many of which play perfectly to Leitrim's strengths.**

Fáilte Ireland has stated that future growth will be delivered by ensuring that products and experiences align with tourism demand trends and by ensuring that tourism experiences are fit for purpose. Tourism in Leitrim will be strongly influenced by the following consumer trends, many of which already align well with the tourism offering.

***"Slow tourism is the DNA of Leitrim"***  
Agency interview

**Table 7: Future trends**

Trend	Manifesting as ...
<b>New places to sleep</b>	Visitors embracing alternatives to traditional accommodation supply.
<b>Active adventure</b>	Continuing growth in active adventure travel that integrates 'soft' adventure with nature, culture and outdoor activity.
<b>Active sport tourism</b>	Sport tourism growing due to increase in sports participation events.
<b>Slow travel</b>	Travel that often favours public transport, trails or waterways over environmentally damaging transport. Get to know a place and its people, products and culture.
<b>Generations of travel</b>	An increase in multi-generational travelling together to destinations.
<b>Taste the destination</b>	Global growth in culinary tourism and food experiences.
<b>Green tourism destination</b>	Increased emphasis on destinations with green tourism credentials.
<b>Safety</b>	Visitors looking for security assurance when selecting international destinations.
<b>Health &amp; wellness</b>	Increased focus placed on health and wellness tourism.
<b>Individualisation</b>	Individualisation of holidays and move away from mass tourism patterns.
<b>Digital</b>	Digitalisation is driving visitors to new places within destinations.

**Sources:** Ireland's Hidden Heartlands Regional Development Strategy, Consultant research, Sustainable Tourism in Ireland, understanding the opportunity, Fáilte Ireland 2021.

### 3.3 Targets

**The overall strategic approach is to position Leitrim as an easy-to-access, surprising and tranquil destination with an attractive range of fun, nature-based activity holidays and cultural and heritage gems.**

Leitrim's tourism assets mean that it can confidently target both the domestic market (families and unconstrained adults) and overseas visitors (primarily for cruising, angling, and its large diaspora). In many ways, Leitrim is better positioned than other counties in Ireland's Hidden Heartlands to target overseas markets. Leitrim is also popular among families with young children for whom convenience, easy access, safety and accessible facilities are important considerations when choosing a destination. One positive that emerged from Covid was the fact that Leitrim was discovered by many Irish people for the first time during 2020-2021; people for whom Leitrim was not previously on their radar, but who can be encouraged to return.

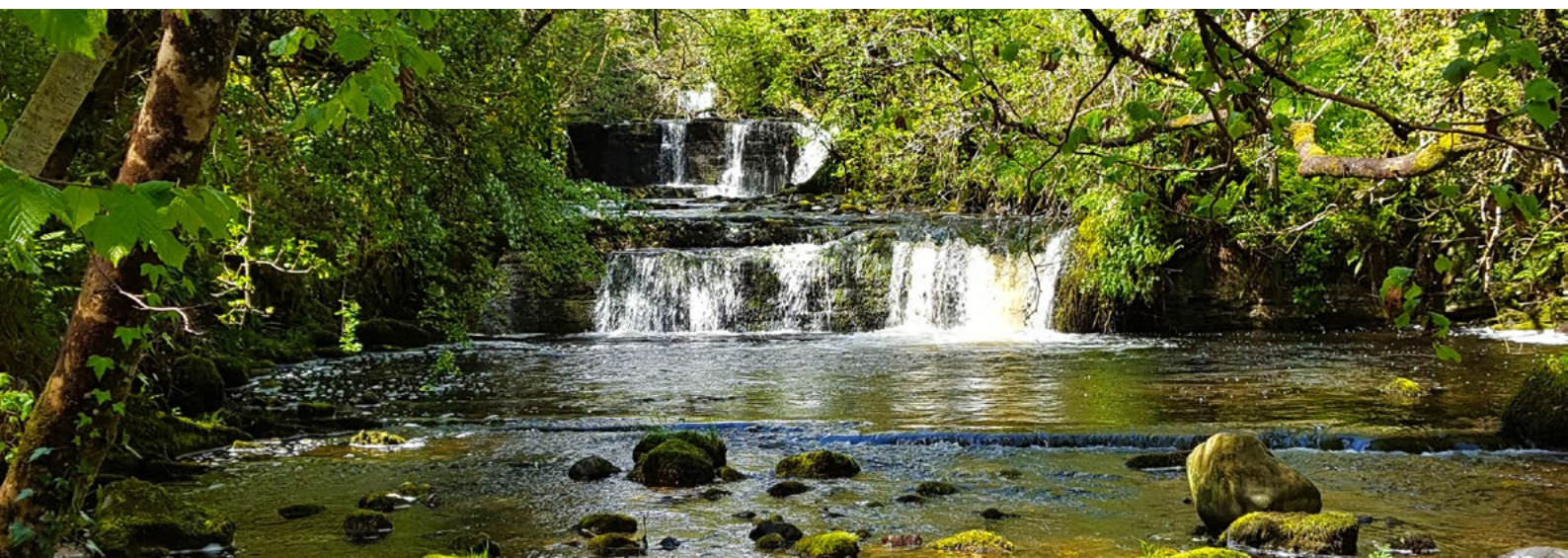
As noted, pre-Brexit and pre-Covid estimates show that tourism in Leitrim was on an upward growth trajectory. Although the Northern Irish market suffered in the immediate aftermath of Brexit, general feedback suggests it is now "as strong as ever".

***"They need to target families with Leitrim as the outdoor playground. The volume is in families and families create buzz."***

*Agency interview*

As tourism recovers and as planned infrastructure projects are completed, specific targets for numbers and revenue can be set by the local authority and tourism stakeholders working together as the *Destination Leitrim Forum*<sup>11</sup>.

In the short term, the target is to ensure Leitrim has an appropriate supply of world class tourism products, services and experiences, supported by market-leading business practices, that stimulate growth in visitor numbers and revenue.



<sup>11</sup> Working title for proposed structure – see chapter 5 for more details.

# The strategic framework 4



## 4 The strategic framework

### 4.1 Introduction and overview

**In aspiring to achieve its vision and ambition, the strategic focus will centre around:**

- **Increasing the supply of public and private products, services and experiences to take advantage of transformational infrastructural developments.**
- **Strengthening communication, collaboration, sales and marketing.**

#### The opportunity

The opportunities are abundant and Leitrim's size and relatively small number of tourism operators can work in its favour in facilitating cluster development and stakeholder engagement. Going forward, an integrated effort to develop tourism across the county will yield benefits for all through a collaborative approach and a focus on market-readiness.

Identifying gaps in the current offering, fast-tracking tourism entrepreneurship, proactively facilitating collaboration, capacity building and the development of products, services and experiences, along with sales, marketing and digital transformation will all shape future performance.

Co-operation and integration between and within all stakeholders will encompass Leitrim County Council Tourism Department as well as other key departments, local and national agencies, private and public operators and local communities.

Capacity building is a strong theme. Stakeholder consultation demonstrated optimism about the future, but it also highlighted the need to advance the sector's skills, knowledge and expertise in order to convert Leitrim's potential into tangible bookings.

Communication, collaboration and networking - at every level - are priorities. There are too many examples of tourism providers being unfamiliar with the local tourism offering, and of tourism providers who share common target customers not working together.

#### Preparing for the future

Within the next 24-36 months, Leitrim will boast an extraordinary tourism and recreational infrastructural base. This presents a wonderful opportunity for Leitrim to become the exemplar of a tourism destination that works for all stakeholders.





## The strategic framework

These five pillars will facilitate Leitrim's transformation to a destination that leads the charge in sustainable and regenerative tourism growth.



## 4.2 Infrastructure & experience development

### Goal

Key recreational and tourism infrastructure development has been completed and their commercial potential has been unlocked through private, community and public investment in supporting tourism products, services and experiences.

### Outcomes

- 1 Blueways and greenways are completed as well as the Bundoran – Mullaghmore Cliff Walk.
- 2 Walking/cycling trails connecting key infrastructure with towns and villages are developed as part of overall master planning.
- 3 Additional recreational facilities in woodland areas cater for locals and visitors.
- 4 Supporting products and services are developed to commercialise infrastructural assets such as water-based activity providers, bike hire businesses, tour guides, cafés etc.
- 5 The feasibility of new experiences is explored e.g., visitor attraction that tells the story of Leitrim's strong connections with water.
- 6 Accommodation is developed to host increased visitor numbers, especially non-traditional or quirky accommodation e.g., lakeside lodges, woodland cabins, glamping etc.
- 7 Access to and within the county is optimised in collaboration with Local Link.
- 8 Volunteer ambassadors welcome visitors and influence visitor flow around the county.
- 9 High quality, attractive and appropriate public realm across all key towns and villages.
- 10 Leitrim is a stakeholder in relevant destination plans e.g., Shannon Masterplan, Beara Breifne Way, Upper Shannon, Shannon Erne & Border DEDP etc.

### Recreational and tourism infrastructure

The "big six" signature projects in the Leitrim Recreation Strategy 2022–2031:

- |                          |                              |
|--------------------------|------------------------------|
| 1 SLNCR Greenway         | 4 Lough Allen Blueway        |
| 2 Cavan Leitrim Greenway | 5 Glenfarne Wood Development |
| 3 Shannon Erne Blueway   | 6 Lough Rinn                 |

Their economic impact will be realised when supporting products and services are established to create experiences and commercialise the opportunity.

*"Leitrim was really busy with domestic tourists during Covid; I know businesses that had to turn away customers and there was no other provider to whom they could refer the business".*

*Agency interview*

## 4.3 Fast-tracking tourism entrepreneurship

### Goal

**Leitrim is renowned for fostering and promoting tourism entrepreneurs, through integrated business supports that make it easy for new entrants – both private and community - to leverage and commercialise key tourism infrastructure.**

### Outcomes

- 1 Existing and potential tourism providers understand the opportunity and actively pursue new product development to commercialise that opportunity.
- 2 Annual increases in supply side capacity are created by:
  - Newly developed businesses adding value to existing and new infrastructure i.e. new accommodation, visitor attractions, activity providers, festivals and events etc.
  - Existing businesses enhancing their existing offering e.g., accommodation extensions, capacity increases with existing activity providers, extended opening hours, addition of outdoor events at festivals to better align with Ireland's Hidden Heartlands and Wild Atlantic Way propositions.
- 3 Leitrim has a solid base of commercially astute product and service providers, who offer a comprehensive array of tourism experiences that encourage extended length of stay to a growing number of sustainably conscious visitors.

*“Drumhierney Woodland Hideaway has been a game-changer and is having a positive impact on the whole economy of Leitrim Village”.*

*Trade focus group*

- 4 A strategic approach to succession planning ensures continuity of experiences when established business owners retire.



## 4.4 Collaboration

### Goal

Leitrim boasts a fully integrated tourism industry where private and community operators and public agencies collaborate effectively as one team.

### Outcomes

- 1 A tourism structure (working title: Destination Leitrim Forum) is established to guide the implementation of the Tourism Framework.
- 2 Annual conference and networking event for tourism providers showcases previous successes and future plans.
- 3 Networks and clusters of tourism businesses collaborate effectively to encourage increased length of stay and repeat visits from an increasingly loyal customer base.
- 4 Cross-county collaboration is optimised, particularly where shared infrastructure can benefit from collaboration on accommodation and promotion.
- 5 Development of a platform that facilitates information exchange between tourism providers so tourists have information on what to do and see at their fingertips.
- 6 Comprehensive engagement with Ireland's Hidden Heartlands and Wild Atlantic Way destination teams.

*"A lot of people research in advance so everybody should have information about what to do in the county on their websites".*

*Trade focus group*



## 4.5 Sales, marketing & digital transformation

### Goal

Sales & marketing activities of operators are strategically aligned with the destination marketing footprint, ensuring cohesive messaging and sales conversion tracking.

### Outcomes

- 1 Digital sales and marketing excellence at a county and individual operator level.
- 2 Industry support for integrated planning with a combined top-down and bottom-up approach to B2B and B2C sales and marketing strategies.
- 3 Consolidated growth in domestic market, particularly in the shoulder and off seasons and potential for day trips is optimised.
- 4 Strategic targeting of prioritised overseas markets that represent the best fit.
- 5 Customer research and insights facilitates future decision-making.

*"We have a lot to offer but we don't make it easy for the customer to buy. We should have itineraries and suggestions for 48 hours, for 3 days, for 5 days and these should be widely available on people's websites and easy to book."*

*Trade focus group*



## 4.6 Sustainability

### Goal

Leitrim consolidates its first mover advantage at every possible opportunity.

### Outcomes

- 1 Leitrim maximises its first mover advantage in regenerative and eco-tourism practices within Ireland's Hidden Heartlands and the Wild Atlantic Way.
- 2 Leitrim businesses over-index as those "that are providing a truly sustainable visitor offering<sup>12</sup>", and as such enjoy additional marketing and sales opportunities.
- 3 New biodiversity woodlands walks offer an alternative to set trails for immersion in nature experiences.
- 4 Tourism providers collaborate closely with the wider tourism industry to reduce carbon footprints by 2030 in line with government targets.
- 5 Notwithstanding growth in year-round visitor numbers, Leitrim's environmental assets are safeguarded for future generations.



<sup>12</sup> Ireland's Hidden Heartlands Regional Tourism Development Strategy

# A new structure for implementation

# 5



## 5 A new structure for implementation

### 5.1 The Destination Leitrim Forum

**Central to this new framework will be a new structure, the Destination Leitrim Forum. The forum will bring about an integrated effort across representatives of Leitrim’s private, community and public tourism stakeholders, including Leitrim County Council’s Tourism Department.**

It is recommended that the forum be representative of geographic and sectoral interests and ought to be led by an independent Chair who will bring expertise, knowledge, leadership skills and an outside perspective to the role.

A number of working groups, tasked with the roll-out of operational plans to support the framework could be established. Although further discussion with tourism providers as the tourism forum is formed will shape these, it is recommended that the following areas be prioritised:

- Experience development – to support product, service and experience development. This may need more than one working group e.g., specific groups for accommodation, activities, experiences, festivals, night-time economy etc.
- Capacity building – across the five pillars of the framework to ensure tourism providers engage with off-the-shelf and bespoke training.
- Sales, marketing and digital transformation – led by key tourism providers to ensure optimal integration between destination marketing campaigns and their own tactical sales conversion activities.
- Collaboration – with responsibility for framework launch, annual conference and networking events.
- Sustainability – to ensure Leitrim consolidates, at every possible opportunity, its first mover advantage of the visitor experience.

*“We are working away ourselves, but we need more help. The community will pull together, they understand what can be achieved when we work together, we just need help to do that”.*

*Public meeting*

The new Tourism Forum will harness the optimism and potential that are evident throughout Leitrim. A Steering Group of key business providers should be invited to progress its development immediately to capitalise on existing momentum and ambitions.





## 5.2 Administration and funding

Examples of tourism structures show that two of the main challenges usually faced are:

- › Administration / secretariat
- › Funding

Leitrim County Council is committed to supporting the new Tourism Forum in both of these areas by providing secretariat services to the forum and by continuing to apply for funding from a range of sources including Fáilte Ireland, Leader Program, Waterways Ireland, cross border opportunities, EU funding, and relevant exchequer funding programmes.



## 5.3 Measuring success

**Operational plans and targets that cascade from the Framework will identify metrics and outcomes to be measured by the Working Groups charged with their delivery.**

It is recommended that the main structure and Working Groups meet as frequently as is necessary.

The ultimate metric for the success of this Tourism Framework will be that targets are reached in terms of sustainable increases in visitor numbers and revenue, seasonal spread, and distribution of tourism's social and economic impact throughout the county.

### A snapshot of what tourism providers say about the framework and its implementation:

*"Need to encourage trade to see the county as one and forget about north south divide."*

*"Need information flow and everyone to be involved."*

*"Everybody needs to see the big picture and understand where and how they can get involved."*

*"Who will drive the strategy? Who'll check implementation and follow through?"*

*"We need to keep things alive, keep the motivation going for people."*

*"We need to get feedback from structure on how things are going for everybody - a season barometer as it were."*

*"Different businesses could host the trade update meetings from time-to-time."*

# Action Plan 6



## 6 Action plan

The headline actions outlined below for each of the strategic pillars will require further development and a comprehensive Action Plan will need to be implemented by the relevant stakeholders, in order to realise the ambition and optimise the potential of the tourism sector in Leitrim.

### 6.1 Infrastructure & experience development

#### Key Actions

##### **Prioritise key infrastructure developments**

Deliver “Get Blueway/Greenway/Cliff Walk Ready” programmes to encourage existing and new businesses and communities to commercialise infrastructure on land, in woodlands on inland waterways and on the coast.

##### **Increase accommodation stock**

Encourage development of quirky /non-traditional, Fáilte Ireland approved accommodation, highlighting the benefits for both domestic and international marketing opportunities.

##### **Activities and visitor attractions**

Support development of new visitor attractions and activities and ensure supporting and ancillary infrastructure and supports (e.g. equipment hire, guiding services, slipways, drying rooms, bait storage etc.) are optimised.

##### **Access**

Liaise with Local Link and tourism providers to develop tourism-focused routes.

##### **Way finding and interpretation**

Audit existing wayfinding, interpretive signage, tourist information.

##### **Slow adventure tourism / eco-tourism experiences**

Identify tourism providers to engage in development of new packages, itineraries and touring routes.

##### **Public realm**

Expedite public realm developments and opportunities for tourism providers to work with Tidy Town Committees/retail businesses to ensure high standards in town and village presentation.

##### **Evening economy**

Create a working group to ensure evening dining options are available and encourage development of new evening time experiences (5pm -9pm).

##### **Ambassador programme**

Design and activate ambassador programme for towns to include recruitment and training so that visitors have easy access to advice and recommendations on where to go, what to do etc.

##### **Cultural experiences: festivals & events, music, food, art**

Re-energies local festivals and events to drive attendance and continue to build on the Taste Leitrim initiative.

##### **Communication**

Ongoing programme of communication across all sectors of the industry.

##### **Capacity building**

Foster a culture of continuous learning and continuous improvement among tourism businesses and communities.

## 6.2 Fast-tracking tourism entrepreneurship

### Key Actions

#### Publicise the tourism opportunity

Implement a communications campaign to highlight impending greenway, blueway, coastal and other relevant infrastructure developments.

#### Role modelling

Organise and fund study trips for new market entrants and existing tourism providers to observe best practice with tourism providers who have successfully commercialised in Ireland and elsewhere.

#### Capacity building

Provide hands-on support and a “one-stop-shop” to help new and potential entrants to the tourism sector.

## 6.3 Collaboration

### Key Actions

#### Destination Leitrim Forum

Establish a new tourism structure with sectoral and geographic representation.

#### Cross-selling and cross-promotion

Develop an annual programme of opportunities for collaboration and networking, e.g. annual tourism conference, familiarisation trips, itineraries, information sharing, etc.

#### Cross county collaboration

Explore opportunities to enhance cross-county collaboration e.g. to address accommodation challenges in the short-term, to develop commercial experiences around shared infrastructure, joint promotion, etc.

#### Collaboration with agencies

Strategic partnerships with Fáilte Ireland, Coillte, Waterways Ireland, Leitrim Development Company, etc.

#### Capacity building

Develop and implement training programmes on collaboration, customer care, etc.

## 6.4 Sales, marketing & digital transformation

### Key Actions

#### Transformational change in digital infrastructure

Develop and implement a digital marketing strategy that ensures an integrated approach to the digital footprint of individual businesses and the digital footprint of the destination.

#### Sales & marketing

Active trade engagement and decision making based on research findings to inform annual B2B and B2C sales & marketing plans.

#### Domestic market

Target visitors who were first-time visitors to Leitrim during Covid-19 to convert them to repeat visitors, particularly in shoulder and off-seasons.

#### Overseas markets

Liaise with Fáilte Ireland and Tourism Ireland regarding overseas market with best opportunities to target.

#### Customer research

Develop an annual research programme that includes a working group with key providers who service a significant proportion of Leitrim's visitors to capture quantitative visitor data.

#### Capacity building

Signpost trade to online training supports available from Fáilte Ireland for B2C and B2B marketing, sales and distribution.

## 6.5 Sustainability

### Key Actions

#### Sustainable destination management

Consolidate first-mover advantage of Leitrim's reputation as a sustainable destination.

#### Safeguard environmental assets.

Ensure environmental sustainability is at the core of product and experience development.

#### Spotlight on sustainable tourism providers

Collaborate with Fáilte Ireland in its marketing and sales support for businesses that provide a truly sustainable offering.

#### Capacity building

Signpost trade to environmental supports available from Fáilte Ireland Climate Action, SEAI Energy Efficiency initiatives.

# Appendices 7



# 7 Appendices

## 7.1 Consultees

Thank you to the following for their input to this review and framework.

Name	Organisation
Alan Hill	Alan Hill Consultants
Alan Kane	Lough Rinn Castle
Bernadette Hamill	Hammill's B&B
Bodo Funke	Angling Services Ireland
Brendan Barry	Planning, Economic Development & Infrastructure SPC Committee
Brian Smyth	Leitrim Development Company
Bryan Fennell	Formerly Leitrim Development Company
Chris Gonley	Leitrim Development Company
Ciara Maxwell	The Shed Distillery
Ciaran Kelly	The Landmark Hotel
Colm McGrath	Planning, Economic Development & Infrastructure SPC Committee
Daithi deForge	Coillte
Darragh Connolly	Cavan Leitrim Railway
Deirdre Lewis	SLR Consulting
Eileen Gibbons	Electric Bike Trails
Emer Connolly	Leitrim County Council
Enda McGloin	Planning, Economic Development & Infrastructure SPC Committee
Eva Costello	Fáilte Ireland - Wild Atlantic Way
Finola Armstrong McGuire	Planning, Economic Development & Infrastructure SPC Committee
Fiona Dunne	Fáilte Ireland - Ireland's Hidden Heartlands
Ita Reynolds	Planning, Economic Development & Infrastructure SPC Committee
Jason Horkan	The Redbank Restaurant
Jennie O' Hara	Fenagh Visitor Centre
Jim Kelly	Leitrim Lodge Restaurant, Bar and Accommodation



Name	Organisation
Joe Dolan	Businessman
John Bredin	Carrick on Shannon Heritage Group
Joseph Gilhooly	Leitrim County Council
Justin Warnock	Planning, Economic Development & Infrastructure SPC Committee
Louise Fitzpatrick	Lough Key Forest Park
Marian Leydon	Fáilte Ireland - Product Development
Mark Rodding	Carrick Craft
Markus Müller	Inland Fisheries Ireland
Michael Donlon	Coillte
Michael Fitzsimons	Fáilte Ireland - Product Development
Michelle Coghlan	Drumhierny Woodland Hideaway
Mike Feeney	Leitrim Recreation Forum
Nuala McNulty	Tawnylust Self Catering
Paddy Mathews	Fáilte Ireland - Ireland's Hidden Heartlands
Pamela Ruddy	Moon River Pleasure Cruiser
Paul Jordan	Coillte
Ronan Maher	The Oarsman
Sarah McCarthy	Fáilte Ireland - Ireland's Hidden Heartlands
Sean McDermott	Planning, Economic Development & Infrastructure SPC Committee and Rainbow Ballroom of Romance
Seán Ó Conláin	Planning, Economic Development & Infrastructure SPC Committee
Sharon Lavin	Waterways Ireland
Shay O'Connor	Leitrim County Council
Sinead McDermott	Leitrim County Council
Stephen Conlon	Irish Boat Rental Association (IBRA)
Tanya Cathcart	Fermanagh Lakeland Tourism
Teresa Kennedy	Glenview Guesthouse
Trevor Seery	Black Donkey Brewing

## 7.2 Documents

### The document review included the following:

An Economic Development Plan for Mohill

Beara Breifne Master Plan

Bundoran Tourism Development Projects Masterplan

Collaborative Town Centre Health Checks, Queen's University Belfast

Carrick-on-Shannon Economic Development Plan 2020-2030

Destination Experience Development Plan for Leitrim, Cavan and North Roscommon

Leitrim County Development Plan 2023-2029

Recreation Strategy for County Leitrim 2022-2031

Dromahair Development Framework

Drumshanbo/ Leitrim Village Economic and Tourism Plan

Economic Development plan for Mohill

Embracing Ireland's Outdoors - National Outdoor Recreation Strategy 2023-2027

Fáilte Ireland, Bundoran Tourism Development Projects Masterplan, June 2022

Fáilte Ireland, December 2022, Tourism Barometer

Fáilte Ireland, Ireland's Hidden Heartlands Regional Tourism Strategy, 2023-2027

Fáilte Ireland, May 2022, Accommodation Supply Dashboard

Fáilte Ireland, Tourism facts 2019: Ireland's Hidden Heartlands

Fáilte Ireland, Wild Atlantic Way Regional Tourism Strategy, 2023-2027

Glenfarne Wood – Recreation and Tourism Development Strategic Plan

ITIC, Recovery and Outlook 2023

Tourism: A Taste of Leitrim, 2019 (J. Dolan)

Shannon Master Plan

Sustainable Tourism Working Group, Actions to Promote Sustainable Tourism Practices 2021-2023

To The Waters and the Wild; A plan for the Manorhamilton Rural Economic Development Zone; Reviewing and Rolling Forward the Plan 2019-2022

## 7.3 Extract from Leitrim Tourism Strategy 2015-2021

### 4.4 2021 Targets for tourism in Leitrim

The Leitrim Draft County Development Plan 2015-2021 states:

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

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

2021 targets for Leitrim		
Tourist numbers	Tourism revenue	Jobs supported
296,000	€70m <sup>13</sup>	2,400

### Detail of targets

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

Source: A growth strategy for Tourism in Leitrim 2015-2021

<sup>13</sup> Refer to table 5: Tourism in Leitrim – 2019 estimates vs targets. In real terms, i.e., 2014 prices

## Notes to the targets

1. Fáilte Ireland data is used as a baseline to set targets for overseas markets.
2. For the domestic and Northern Ireland markets, an absence of data means that estimates have been developed as a baseline against which targets are set and future growth can be measured (see chapter 2). Over the life of the strategy, efforts must be made to gather more accurate data.
3. Leitrim is very reliant on the domestic market (80%+ in some cases). Future, additional domestic growth will be targeted from people who themselves choose Leitrim for their holiday, not just to attend an event or occasion.
4. There are opportunities to further grow the Northern Ireland market.
5. Growth from overseas is essential: the trade has expressed a desire for more overseas visitors who have a higher per capita spend<sup>14</sup>, and the Leitrim holiday experience can deliver on the needs and motivations of certain overseas target segments. A doubling of overseas visitors would mean that Leitrim still gets just 1% of all overseas visitors to Ireland.
6. 2013 is the latest year for published overseas data. Nationally, overseas visitors grew in 2014 by 9%. In the absence of data, a conservative 5% growth in 2014 is applied for Leitrim.
7. Tourism Ireland predicts 6% growth in overseas visitors in 2015. This strategy targets growth of 6% in 2015 for Leitrim, with higher rates targeted from 2016. Growth is from a very low base, so these rates are achievable.
8. Within Mainland Europe, Germany will be prioritised. There is particular potential to target German Great Escapers because of the fit between what they want and the Leitrim tourism experience. Tourism Ireland is targeting 9% growth from Germany in 2015 but this strategy is targeting growth of 15%, again from a very low base. The Netherlands will also be targeted for angling.
9. A higher growth rate is targeted from the US for 2016 to coincide with the 2016 commemorations.
10. Based on current occupancy rates of 53%<sup>15</sup>, there is capacity within Leitrim's accommodation stock to cater for growth. As the strategy delivers, the private sector will see opportunities to develop additional capacity.
11. Tourism Ireland predicts that in 2025, overseas tourism revenue will come from GB (26%), NA<sup>16</sup> (27%), ME (34%) and ROW (13%). While there are certainly opportunities in other long haul markets, it makes sense for Leitrim to focus its international efforts on GB, NA and Europe, as it is underperforming in these markets relative to its potential.
12. The Draft National Tourism Policy for Ireland states that marketing of individual counties overseas is largely ineffective. Leitrim's success abroad will be through collaboration with trade and agencies and a world class online presence. An effective online presence is vital at all levels: by Leitrim collectively, and by the trade.
13. Leitrim is within a three hour drive of five airports: Belfast, Derry, Dublin, Shannon and Ireland West Airport Knock.
14. Dublin, home to 27% of Ireland's population, is around a two hour drive. Accessibility will be an important message for the domestic market.
15. To meet targets, solid collaboration among Leitrim stakeholders will be required.

<sup>14</sup> Nationally, the domestic market accounts for 60% of bednights, but overseas accounts for 60% of revenue, so a greater focus on growing international tourists will also grow yield for Leitrim's tourism businesses.

<sup>15</sup> Fáilte Ireland Hotel review 2012; Room occupancy in Northwest region.

<sup>16</sup> NA = North America (United States + Canada), ME = mainland Europe, ROW = rest of world.







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